

CAPITAL  MARKETS

HAYWOOD

GOLD LEAF

Managed Solutions



Leveraging our experience. Building on your success.

Since 1981, clients have trusted Haywood for targeted investment research, advisory and capital markets expertise, trade execution, and discretionary portfolio management services.

Today, Haywood builds on this track record by helping our retail clients achieve freedom and financial success with the introduction of Gold Leaf Managed Solutions.

Gold Leaf Managed Solutions allows you to build on your success by offering a carefully curated selection of Managed ETF Solutions, Managed Equity Solutions, and our Tailored Portfolio Services.

MANAGED
ETF
SOLUTIONS

MANAGED
EQUITY
SOLUTIONS

TAILORED
PORTFOLIO
SERVICES



Gold Leaf Managed Solutions

Why Gold Leaf Managed Solutions

Available through your Haywood Investment Advisor, your Gold Leaf account is a portfolio of securities held directly by you and professionally managed by reputable money managers who might otherwise be accessible only to institutional investors.

Haywood Gold Leaf Managed Solutions offers you the freedom to build on entrepreneurial and capital markets successes. Trusted and skilled money managers put their knowledge and experience to work turning financial success into financial security.

What Gold Leaf Managed Solutions Offer

TRANSPARENCY

Transparency through direct ownership of securities. You always know what's in your portfolio and you can follow trading activity in each position in your Gold Leaf Managed Solution on-line.

DIVERSIFICATION

Professional money managers ensure the level of diversification expected in all our Managed Equity Solutions. Achieve even greater diversification with Haywood Managed ETF Solutions.

PROFESSIONAL MANAGEMENT

Access to the accumulated knowledge and experience of professional money managers.

TAX EFFICIENCY

By directly holding all the individual securities in your portfolio, your Gold Leaf account gives you and your Haywood Investment Advisor more flexibility in tailoring a tax-advantaged investment strategy that best suits your needs and circumstances.

Gold Leaf Managed Solutions

AT A GLANCE



Managed Equity Solution Partners



Bristol Gate uses machine learning and other data science techniques in combination with fundamental analysis to construct high dividend growth portfolios while avoiding emotional bias in the investment process.



Momentum approach that employs innovative strategies rooted in fundamental change, sophisticated modeling, institutional-grade stress testing, and forward thinking to maximize return in a Canadian only equity offering.



GUARDIAN CAPITAL

Founded in 1962 Guardian Capital Group offers high conviction active share portfolios with a growth-oriented approach at a reasonable price. Solution partners will be based out of Canada, the US and the UK.



Both top down and bottom up style manager assessing market risk and employing daily screening to proactively identify leading companies across all sectors of the market.



Seasoned investment professionals focus on niche opportunities while maintaining a collaborative culture based on idea sharing and entrepreneurial thinking. The offering will be based on an all-weather sustainable approach targeting global large capitalized blue-chip stocks.



Rigorous fundamental research and integrated team-based approach of more than 45 investment professionals to grow capital with a lower risk bias. Seeks to invest in high quality businesses that will consistently create value over time.

Managed ETF Solutions

GOLD LEAF Diversified Fixed Income

Seeks to produce stable income and superior risk-adjusted returns over a complete cycle. Investments are selected across geographies to include core Government bonds, as well as Investment Grade and High Yield bonds. Floating rate bonds and preferred shares are also in our selection universe. The PM manages credit risk, liquidity risk and re-investment risk while capitalizing on duration and yield curve exposures.

GOLD LEAF Growth

Offers a diversified portfolio more heavily weighted towards capital appreciation across equity sectors in both North American and global markets. Certain hedging techniques are employed to protect clients from the unexpected. Cost effective and flexible, Gold Leaf Growth is best suited to an investor who has a greater risk appetite and is seeking above average returns.

GOLD LEAF Balanced

Targets long-term capital growth with a moderate level of income by investing primarily in equity and fixed income ETFs. Position weightings center on a traditional 60/40 asset allocation stance. Defensive strategies and flexible cash components are used to preserve capital and manage risk in times of uncertainty. Gold Leaf Balanced is constructed for an investor with a low to medium risk tolerance who is looking for a one-stop solution.

GOLD LEAF Alternative Opportunities

Against a backdrop of a volatile global macroeconomic environment, this solution is designed to provide long-term growth and downside protection by investing in assets that are uncorrelated to traditional equities and bonds. This “go anywhere” tactical solution currently considers real estate, infrastructure, global thematic, and commodities & currencies. Liquid market neutral and absolute return hedge funds are also used in this engineered portfolio.

Gold Leaf Tailored Portfolio Services



Portfolio Solutions Tailored to Fit

Haywood Gold Leaf Tailored Portfolio Services offer customized, client-centric, multi-asset portfolios for individuals and their families, business owners and like-minded entrepreneurs.

Our Investment Advisors and Portfolio Managers provide innovative investment strategies tailored specifically to your risk appetite that aim to deliver enhanced risk-adjusted long-term returns.

Your portfolio holds securities that you own directly, constructed on a discretionary basis employing a strict buy and sell discipline that takes the emotion out of the decision-making process. Our client-focused philosophy always places your needs at the forefront.

Marrying current quantitative investment techniques and strong fundamental analysis, we aim to construct portfolios that weather market volatility while providing realistic potential for growth.

The Haywood Gold Leaf Advantage

The financial industry is a complex world in which the timing and quality of information is essential when making intelligent investment decisions.

Matching clients investment objectives with the movement of the market requires diversified managed solutions that are both flexible and disciplined while anticipating unforeseen risks. That's the true value of active investing.

This is precisely why Haywood does not narrow its focus to a single mandated investment philosophy.



Contact your Haywood Investment Advisor today

HEAD OFFICE - VANCOUVER

Waterfront Centre
#700-200 Burrard Street
Vancouver, BC V6C 3L6

PHONE: 604-697-7100
TOLL FREE: 800-663-9499

TORONTO

Brookfield Place
#2910-181 Bay Street
Toronto, ON M5J 2T3

PHONE: 416-507-2300
TOLL FREE: 866-615-2225

CALGARY

Alberta Hotel Building
#301-808 First Street SW
Calgary, AB T2P 1M9

PHONE: 403-509-1900
TOLL FREE: 877-604-0044

Haywood.com



CAPITAL  MARKETS

HAYWOOD

ABOUT HAYWOOD SECURITIES

Founded in 1981, Haywood is a 100 per cent employee-owned investment dealer with more than 300 employees in its Canadian offices in Vancouver, Calgary and Toronto. Haywood Securities Inc. is a member of the Toronto Stock Exchange, the TSX Venture Exchange, the Montreal Exchange (MX), the Canadian Securities Exchange (CSE), the Canadian Investor Protection Fund (CIPF), and the Investment Industry Regulatory Organization of Canada (IIROC). In addition, Haywood Securities (USA) Inc., a wholly owned subsidiary, is a broker-dealer registered to transact securities business in the United States and is a member of the Financial Industry Regulatory Authority (FINRA).