

# PARTNERS PROGRAM MANAGER PROFILE

1<sup>st</sup> Quarter 2017



CONNOR, CLARK & LUNN INVESTMENT MANAGEMENT LTD.

## PARTNERS MANDATES

Connor, Clark & Lunn Investment Management (CC&L) provides the following professional investment portfolio management services for the Raymond James Partners Program:

- Enhanced Income (Government, Corporate, High Yield Bonds, Dividend paying stocks and REITS)
- Core Income & Growth (Dividend paying stocks, REITs, and Corporate Bonds)
- Equity Income & Growth (Dividend paying stocks & REITs)

## HISTORY

Connor, Clark & Lunn Investment Management Limited was founded by Larry Lunn in 1982. Today, CC&L is one of the largest independently owned investment management firms in Canada with approximately \$48.8 billion in assets under management. CC&L is a partnership of 26 entrepreneurial investment professionals focused on delivering both traditional and innovative solutions to its clients. CC&L is an independently owned investment company and part of the Connor, Clark & Lunn Financial Group. The group is an affiliation of investment management firms, who provide investment expertise to institutional and individual high net-worth investors.

## PORTFOLIO MANAGERS

The portfolio managers on the investment teams have extensive investment industry experience. Team members have both broad industry experience and strong academic credentials and are responsible for both research and portfolio management within their respective sectors.

### Fundamental Equities Team:

**Gary Baker** \*, CFA, Head of Fundamental Equities

**Steven Vertes**\*, CFA, Portfolio Manager – Fundamental Equities

**John Novak**\*, CFA, Portfolio Manager – Fundamental Equities

**Samba Chunduri**\*, Portfolio Management – Fundamental Equities

**Mark Bridges**\*, CFA, Portfolio Manager – Fundamental Equities

\*2017 Canadian Top Gun Investment Minds (Brendan Wood International)

### Fixed Income Team:

**Brian Eby**, CFA, Co-Head of Fixed Income

**Chris Kalbfleisch**, CFA, Co-Head of Fixed Income

**David George**, CFA, Portfolio Manager – Fixed Income

**Jane Justice**, Portfolio Manager – Fixed Income

**Simon MacNair**, Portfolio Manager – Fixed Income

## INVESTMENT PHILOSOPHY & STYLE

- Deliver attractive & sustainable yield plus growth to outpace inflation
- Focus on best ideas, not benchmark tracking
- Our deep & experienced fundamental equities team covers the entire Canadian universe from large to small cap
- Employ target price discipline & remain well diversified to provide downside protection

## KEY FACTS

- Strong track record of risk adjusted returns
- Attractive & sustainable yields: portfolios deliver yields well above traditional Canadian benchmark oriented mandates

**RAYMOND JAMES**