



10th Anniversary

10th Anniversary! 2004 Canadian Investment Awards "Recognizing Long-Term Investing"

The 2004 Canadian Investment Awards will mark their 10th anniversary with unprecedented substance and style and this year's program will bring many exciting developments.

The award program is a forum for the Canadian financial services industry, advisors, investors and analysts from across the country to recognize, reward and celebrate tremendous growth, many achievements and enduring commitment to excellence and community investment. This year's theme, "Recognizing Long-term Investing", reflects a move to a longer-term perspective throughout the program and specifically when selecting award winners, and therefore will be less focused on recent years' performance. Two strategic initiatives that will also enhance the Canadian Investment Awards' 10th anniversary edition: the awards lineup will recognize a broader range of investment products and the analysis of award candidates will be enhanced.

This is the only event in Canada that commemorates the one and only time, each year, that the entire industry, investors and advisors are represented across the financial services industry to aggregately input on and recognize leadership. This aggregation is unique to this awards program and provides the most unbiased and objective perspective available to the industry, investors and advisors alike. Constantly, in search of excellence, the program underwent extreme analysis and industry input to make it even tougher to be recognized a leader - What a remarkable achievement it is to be a winner or finalist!

All award categories, committees and criteria have been reviewed and revised. Several new award categories have been added: Labour Sponsored Investment Funds, Income Trusts, Hedge Funds (TBD) and others (see below). The addition of the Income Trust awards is especially significant, as it marks the first time that an actual asset class has been added to the awards. Each of the other categories recognizes some form of fund product rather than the underlying asset. This innovation is in keeping with the Canadian Investment Awards' ongoing policy of widening the scope of the awards. This development was accentuated in 2001 when the event was renamed from the former Canadian Mutual Funds Awards.

The other strategic initiative, to enhance the analysis of award candidates, is being pursued on two fronts:

- The scope of the analysis is being widened, as both qualitative and quantitative factors will be considered when selecting the winners. As in the past, strict attention will be paid to the quantitative performance of a fund on an absolute, relative and risk-adjusted basis. Other quantitative factors also will be considered, such as various measures of risk and the fund's diversification benefits. Attention also will be paid to qualitative factors, such as management quality, availability, and fee structure.
- An open forum discussion among committee members will take place before the final voting on awards takes place. This will allow for greater cross-pollination of ideas.

These measures will result in a broader range of issues being considered so that the most deserving candidates are awarded.



10th Anniversary

Additional improvements to the Canadian Investment Awards program are varied and include:

1. Awards:

- a. Decade Awards: These include several key awards to recognize true long-term investing excellence.
- b. Marketing and other submission-based awards: have undergone revision of judging, criteria and categories.
- c. Dealer Awards: Creation of new award to support the distribution channel and to support new advisor strategies.
- d. Social Responsibility Award: Creation of a new award to recognize the best Socially Responsible Fund. Funds are recognized for their performance and the quality of their social responsibility standards.
- e. Career Achievement and Person of Influence of the Decade awards: will move to a peer-voted award format.
- f. Investors and Advisors Choice awards: to move from open balloting to a controlled survey approach over next two years.

2. Industry Committee: Creation of an industry advisory group is underway to reflect industry requirements and to meet with key industry participants to ensure industry input is well represented. One person from each firm is requested to participate. If you wish to be involved, please contact us.

3. Canadian Investment Guide: The first annual special Investment Executive publication to communicate results, historical research/results with primary focus to context and education provided by IE's editorial team. This annual publication will be available as of December 3 to industry members and consumers, with a distribution of 150,000. If you wish to advertise or distribute, please contact Ozy Camacho at Investment Executive, 416-218-3677 or ocamacho@investmentexecutive.com.

4. Gala Event: Industry input has provided new direction for the gala event itself. Details include:

- a. Date: December 3, 2004.
- b. Location: Roy Thomson Hall, Toronto.
- c. Dress: Black Tie.
- d. Reception and Dinner: 6:00 – 8:00 p.m. Exceptional catering and bar service to address ease of distribution for larger dine around atmosphere with percentage of café table availability.
- e. Open Reception, Awards Show: 8:00 – 9:15 p.m. Awards will be presented in reserved-seat-theatre, "Oscar" format. There will be a professional host with exciting pre-produced video and other multimedia support. The theme for event, in line with the award vision, will also be "Long-term Investing" with a retrospective flavour. Note: The awards presentation will be streamlined to shorter show, and as a result some awards will not accommodate acceptance speeches.
- f. Post Party/Dessert: 9:00 – 12:00 p.m. Dessert, photo gallery, gala bags, Canadian Investment Guide launch and media interviews.

The 2004 Canadian Investment Awards will mark their 10th anniversary with unprecedented substance and style. For more information, visit www.investmentawards.com (launching October 4) or contact us at info@investmentawards.com