



{ Measure Of Your Success }

Please join us for...

MATCO'S 2012 TAX SEASON LUNCHEON:

Keeping Ahead of the Tax Man

- Tuesday, February 7 @ 11:45AM - 1:00PM

Please join us to learn about the tax implications & benefits related to investments. Specifically, a discussion on the following

- Registered Plans (RRSPs, RESPs, etc)
- Tax Free Savings Accounts (TFSA)
- the flexibility and tax advantages of Corporate Class Mutual Funds

Over the last year, Matco's Funds outperformed 75% of its peers across Canada as ranked by GlobeFund (Globe & Mail). Not only are Matco clients benefiting from strong performance, but they are paying 40% lower fees by dealing direct with a focused, local, and independent investment manager who has one mandate: to manage money & provide unbiased institutional investment solutions. Currently, Matco manages approximately \$350 million dollars on behalf of private clients, mutual fund investors, not-for-profits, foundations, trusts, & institutional investors. Matco's principals founded the firm in 2006 given their deep roots in money management bringing their investment management experience from firms such as Franklin Templeton, Fiduciary Trust Company of Canada, Bissett & Associates, Royal Bank, Guardian, Tristone, & CPMS (Morningstar).

LOCATION:

Matco's Boardroom: 4th Floor, 407 – 8th Avenue SW (downtown Calgary)

SPEAKERS:

Daniel S. Cheng, CFA – Vice-President, Portfolio Manager

Mr. Cheng is a member of the Matco investment committee. He is also a member of Matco's Canadian Equity Group, which is responsible for the Canadian Equity, Small Cap, and Energy Portfolios. Mr. Cheng was formerly with Ross Smith Energy Group, an energy research firm. He was also a member of the institutional equity research group with Tristone Capital Inc.

Justin G. Charbonneau, CFA, DMS, FCSI – Vice-President, Portfolio Manager

Mr. Charbonneau works directly with private clients and mutual fund investors. He is also a member of the Matco investment committee that is responsible for strategic asset mix, investment research and portfolio management. Mr. Charbonneau also serves as Co-Manager of Matco's Balanced, Bond, and Preferred Share portfolios. Prior to joining Matco, Mr. Charbonneau served as a member of McLean & Partners investment committee and managed a diverse group of private clients. Mr. Charbonneau volunteers his time sitting on the Board of Directors for the Calgary CFA Society acting as chair on the Professional Development portfolio and as a member of the Society's Investment Committee.

Seating is limited– please RSVP!

RSVP: Email **Lindsay Bryant** @ lbryant@matcofinancial.ca or phone: 403-718-2127