



{ Actively Investing In Your Future }

## Please join us for...

### MATCO'S 2012 TAX SEASON LUNCHEONS:

#### Matco's TOP 10 for 2012

- Tuesday, January 31 @ 11:45AM - 1:00PM
- Wednesday, February 1 @ 11:45AM - 1:00PM

Please join us to learn more about:

- 1) what Matco expects the major themes to be for the capital markets in 2012
- 2) timely & useful tax planning ideas
- 3) Matco's approach to investment management which has outperformed 75% of its Canadian money manager peers in 2011 (*ranked by GlobeFund*)

#### The One-Stop, Worry-Free, Tax-Efficient Portfolio Solution

- Wednesday, February 22 @ 11:45AM - 1:00PM
- Thursday, February 23 @ 11:45AM - 1:00PM

Please join us to learn more about how Matco manages balanced portfolios which offer the best of all worlds and have outperformed 75% of its Canadian Neutral Balanced peers (*ranked by GlobeFund*):

- 1) income
- 2) preservation of capital
- 3) growth with a risk management focus

### LOCATION:

**Matco's Boardroom: 4<sup>th</sup> Floor, 407 – 8<sup>th</sup> Avenue SW (downtown Calgary)**

### SPEAKERS:

#### **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.*

#### **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.*

**Seating is limited– please RSVP!**

RSVP: Email **Lindsay Bryant** @ [lbryant@matcofinancial.ca](mailto:lbryant@matcofinancial.ca) or phone: 403-718-2127