As we approach our **25th anniversary**, we're reflecting on our journey and looking ahead to our next chapter with a focus on continued excellence. In line with this future perspective, we are excited to share a significant milestone. We are pleased to announce our acquisition by **Harbourfront Wealth,** an industry-leading independent wealth management firm. We believe this agreement represents a natural evolution of our commitment to delivering exceptional service, deep expertise and our long term vision to being **the most relevant private client firm in Canada**.

Who is Harbourfront Wealth?

Harbourfront Wealth is a leading **Canadian wealth advisory and investment management firm,** known for its innovative approach and client-first philosophy. Their deep-rooted commitment to service, transparency, and forward-thinking solutions aligns perfectly with our values. Together, we are uniquely positioned to deliver even greater value to you - our clients and partners.

As part of this partnership, KJ Harrison Investors will continue as your premier High Net Worth (HNW) and Family Office boutique, building on our legacy of delivering strong investment returns and tailored wealth solutions to private individuals and families.

With the acquisition of KJ Harrison Investors, Harbourfront's total assets under administration (AUA) now exceeds $10 billion CAD, further reinforcing their position as a leading force in Canada's wealth management industry.

Why Harbourfront Wealth?

We have known Harbourfront Wealth for many years and have always been impressed with not just what they have built, but how they have built it. Much like KJH, they are deeply committed to independence and delivering an exceptional client experience.

Partnering with Harbourfront Wealth allows us to continue investing in relevant investment strategies, wealth planning capabilities and technology and risk management systems that protect and grow your wealth. Their focus on innovation and operational excellence allows us to deliver even more personalized solutions - while maintaining the transparency, security, and the trusted advice you rely on.

This partnership strengthens our ability to deliver:

- **Enhanced technology and gold-standard risk management** through an advanced technology platform, backed by industry leading cybersecurity, compliance and risk management practices. As the financial industry continues to evolve rapidly, this partnership ensures we stay ahead of the curve with innovative tools that protect and empower your wealth.

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- **Sustain our leadership** in delivering high-impact wealth management tools and solutions for HNW families like yours.
- **Expand our service offerings** with a broader investment platform to help you achieve your version of financial success.

What This Means for You

Your experience as our client remains our top priority, and this partnership allows us to enhance our capabilities to serve you more effectively and efficiently.

Here's what stays the same and what improves:

- **Your Portfolio Management Team Remains Unchanged:** Your current relationship management team will not change - your Portfolio Manager, and the KJH team remains fully committed to serving you. The KJH partners have personally reinvested in this partnership by rolling over a significant component of their KJH equity into Harbourfront Wealth — underscoring their confidence in this partnership and its future. You can expect the same dedication and care you've always known.
- **Leadership Continuity:** Joel Clark will continue as CEO of KJH and Peter Barlas as CIO of KJH. Our entire Investment Team remains in place and will continue managing the KJH pooled fund strategies without change.
- **Same Custodian, Same Oversight:** We will continue to operate under CIRO regulations with NBIN as our custodian. Your client portal (d1g1t), account numbers and day-to-day services remain unchanged.
- **Expanded Resources:** This partnership allows us to enhance our service offering through innovative technology and tools – broadening the ways we can support your financial goals.

Looking Ahead

We are incredibly excited about this next chapter and the opportunities it brings for you. Our unwavering commitment to delivering long term risk adjusted returns and personalized, high-quality wealth management remains at the core of everything we do.

If you have any questions or would like to discuss what this means for you in greater detail, please don't hesitate to reach out to us directly.

Thank you for your continued trust and partnership. We look forward to guiding you and your family toward lasting financial success.