

ABOUT US

KPA Advisory Services provides strategic advice on governance, finance, and investment matters to governments, industry associations, pension plan sponsors, foundations, and other institutional investors.

Founded in 1985, Keith Ambachtsheer, President and Founder, is widely recognized for his 'out-of-the-box' thinking on pension governance, finance and investment issues. In 2005, he was named Director, and Adjunct Professor of Finance, of the Rotman International Centre for Pension Management at the University of Toronto. Also that same year, he was nominated for the **Outstanding Industry Contribution Award by Investments and Pensions Europe** for his sharp focus on international pension issues, including agency, governance and investment issues. In 2007, he was nominated for the **Outstanding Industry Contribution Award by Investments and Pensions Europe** for his sharp focus on international pension issues, including agency, governance and investment issues. In 2003, he was named **One of the 30 Most Influential People by Pension and Investments Magazine** in the USA. His drive for research excellence has won him several notable awards including four Graham and Dodd Awards and two Roger Murray Awards.

His articles appear regularly in the Financial Analysts Journal, the Journal of Portfolio Management, and other professional journals. He has also authored three critically acclaimed books, *Pension Funds and the Bottom Line*, (Dow Jones-Irwin 1986), *Pension Fund Excellence – Creating Value for Stakeholders* (with Don Ezra, John Wiley & Sons, 1998), and *Pension Revolution: A Solution to the Pension Crisis*, (John Wiley & Sons, 2007). Keith issues **The Ambachtsheer Letter** on a monthly basis, which is subscribed to by corporate, public sector, investment, and consulting firm clients around the world.

THE CLIENT ADVISORY SERVICE

The Client Advisory Service includes monthly receipt of **The AMBACHTSHEER LETTER** as well as personal access to the author in the form of our **Call Option**. The **Call Option** can be utilized in a variety of ways – from Board of Director/Trustee Meetings or Education Sessions, to the review of Strategic Planning / Governance Documents, or booking Conference/Seminar Speaking Engagements, as well as Video Conference meetings, or telephone/email conversations.

The Ambachtsheer Letter

As an Advisory Services Client, your subscription to **The Ambachtsheer Letter** is provided on a calendar year basis, and includes one hard-copy of the Letter – along with a binder every two years in order to easily store the hard-copies in your Library or Central Filing system for quick and easy access. In addition, we will gladly add you and any of your colleagues to our electronic Letter distribution list.

Also available is a parallel version of **The Ambachtsheer Letter** which adapts pension research and commentary for the US / Global context. We are happy to provide hard-copies for more than one person in your organization. Both of these options are available as add-on services for an incremental fee. See next page for pricing details.

The Call Option

As an Advisory Services Client your organization is entitled to up to ½ day of personal access to Keith Ambachtsheer.

Additional fees will be charged for both prep and travel time at a rate of \$7,000 per day. Half-day and full-day increments will be available based on actual needs.

The Call Option is available once within a calendar year. The Call Option cannot be applied toward prep or travel time associated with your meeting needs, unless agreed upon ahead of time.

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- US / Global Letter Adaptation = \$1,000
- Back copies of all 2007 Letters = \$500
- Hardcopy for additional addressee = \$100 pp

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STEP 3 – ADDITIONAL CONTACT INFORMATION for Ambachtsheer Letter recipients

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Should you have any questions about this Form please contact Ann Henhoeffler at 416.925.7525 or ann@kpa-advisory.com.
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