

## 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 Canadian 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.

**TO SIGN UP AS AN ADVISORY SERVICES CLIENT  
SIMPLY COMPLETE THE REGISTRATION FORM ON  
THE NEXT PAGE AND SEND IT IN.**

**An Invoice will be sent to you for payment  
after we receive the completed Form.**

Yes, our organization chooses to become an Advisory Services Client.

**STEP 1 – SELECT YOUR SERVICE LEVEL / ADD-ON OPTIONS**

Choose your Annual Service Level:

**1 Year Renewal Option – I will pay:**  \$4,500 CDN or  \$4,900 US    **2 Year Renewal Option – I will pay:**  \$8,000 CDN or  \$8,800 US

Choose any Add-On Option(s):

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

An Invoice will be mailed to the attention of the Billing Contact indicated below.

**DO NOT SEND PAYMENT AT THIS TIME.**

**STEP 2 – KEY CONTACT INFORMATION – this is the contact information for Main Client Contact.**

Company Name				
Name of Main Subscriber		Title		Billing Contact (Y/N)
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City/Town	Province	Postal Code	Country	
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Billing Contact Name / Tel / Email (if different from above)				

**STEP 3 – ADDITIONAL CONTACT INFORMATION for Ambachtsheer Letter recipients**

Insert the contact information for additional people in your organization who wish to receive *The Ambachtsheer Letter*. Please attach a separate page if required. Please print.

First Name	Last Name	Title	Email Address	Please select method of delivery	
				E-copy \$0	Hard Copy \$100 pp

**STEP 4 – AUTHORIZED SIGNATURE**

I understand that all rights are reserved and any materials are not to be copied or distributed without permission.

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Should you have any questions about this Form please contact Ann Henhoeffter at 416.925.7525 or [ann@kpa-advisory.com](mailto:ann@kpa-advisory.com). Please return this completed Form to Ann Henhoeffter via fax at 416.925.7377.