

ABOUT US

KPA Advisory Services provides strategic advice on governance, finance, and investment matters to governments, industry associations, pension plan sponsors, pension funds, foundations, and other institutional investors around the world. The company was founded in 1985.

Keith Ambachtsheer, President and Founder, is widely recognized for his 'out-of-the-box' thinking in the pensions and investments world. In 2008, he was honored with the CFA Institute's prestigious James R. Vertin Award for "research of enduring relevance and value to investment professionals". The readers of Investment and Pensions Europe voted him the 2007 recipient of the Outstanding Industry Contribution Award. In 2003, he was named One of the 30 Most Influential People in Pensions by the US publication Pensions & Investments.

A regular contributor to academic and professional journals, he is also the author of three books, most recently "Pension Revolution: A Solution to the Pensions Crisis" (John Wiley & Sons, 2007). He founded the Rotman International Centre for Pension Management at the University of Toronto in 2007, and is also the Publisher and Editor of the Rotman International Journal of Pension Management.

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, and/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 are 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. Travel expenses are additional.

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. I will pay \$4,500 CDN
- 2 years. I will pay \$8,000 CDN

Choose any Add-On Option(s):

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

All items are
GST applicable.

- Our Organization
is GST Exempt

An Invoice will be mailed to the
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STEP 2 – KEY CONTACT INFORMATION – this is the contact information for Main Client Contact.

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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 Henhoeffler at 416.925.7525 or ann@kpa-advisory.com.
Please return this completed Form to Ann Henhoeffler via fax at 416.925.7377.