

ABOUT US

KPA Advisory Services provides strategic advice on governance, finance, and investment matters to governments, 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. He has been honoured by the global CFA Institute with the Award for Professional Excellence (2011), and the James R. Vertin Award for “research of enduring relevance and value to investment professionals” (2008). In the USA, he was honoured with the EBRI/Lillywhite Award (2010), and in 2003 he was named One of the 30 Most Influential People in Pensions by Pensions & Investment. In Europe, the readers of Investment and Pensions Europe voted him the recipient of the Outstanding Industry Contribution Award (2007).

He is 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 2005, and is also the Publisher and Editor of the *Rotman International Journal of Pension Management*. At the individual Client level, Keith has worked with Boards and Senior Management to raise organizational performance to the next level.

OUR VALUE PROPOSITION

KPA Advisory Services helps Clients become stronger ‘value propositions’ for their stakeholders. We do this through a [Retainer Package](#) (our *Advisory Service*) that contains 3 critical ingredients:

1. OUR RESEARCH SPANS TWO BROAD AREAS

- ◆ **Pension System Design** –we seek ways to enhance pension system fairness, transparency, and sustainability.
- ◆ **The Governance and Management of Pension Institutions** –we seek ways to improve the institution’s mission clarity and organizational effectiveness.

2. ACTIONABLE INSIGHTS AND RECOMMENDATIONS

- ◆ We take care to convert our research insights into practical action steps for Clients.

3. MULTIPLE COMMUNICATION CHANNELS

- ◆ As an Advisory Services Client, your Retainer Package includes receipt of **The Ambachtsheer Letter**, our 4-page advisory letter that addresses our research and action steps. During the calendar year, you will receive monthly **Letters**.
- ◆ Through the **Call Option**, Clients have direct access to Keith Ambachtsheer either by phone, video conference or in person, for consultation or involvement in Board or Investment Committee meetings, strategic documents review and/or strategic planning sessions. Clients are entitled to up to ½ day of Keith’s time, once within a calendar year. *(If additional Call Option time and/or a Client Visit is required, Clients will be charged at a per diem rate of \$7,500. We attempt to keep travel expenses and other charges to a minimum by cost-sharing with other Clients visited on the same trip. We work with our Clients to optimize this value. Our Video Conference option is priced using the same principles.)*
- ◆ Our Clients receive a complimentary a semi-annual copy of the *Rotman International Journal of Pension Management*.



2012 ADVISORY SERVICE AGREEMENT

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

STEP 1 – SELECT YOUR ADVISORY SERVICE OPTIONS.

Choose your Advisory Service Option:

1 Year Option:

2 Year Option:

\$5,000 (for calendar 2012)

\$9,000 (for calendar 2012 & 2013)

(includes one Hard Copy with binder; electronic version available to multiple recipients – see Step 3 below)

Back Copies of *The Ambachtsheer Letter* :

(Available with subscription only):

Back copies of all 2010-2011 Letters = \$500

Back copies of all 2007-2009 Letters = \$500

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 & Billing Contact

Company Name				
Name of Main Subscriber		Title		
Street Number	Street Name	Suite # (if applicable)		
City/Town	Province	Postal Code	Country	
Telephone	Fax	Email		
Assistant Name		Assistant Title		
Assistant Email		Assistant Phone		
Name of Billing Contact		Title of Billing Contact		
Street Number	Street Name	Suite # (if applicable)		
City/Town	Province	Postal Code	Country	
Telephone	Fax	Email		

DISTRIBUTION LIST

STEP 3 – ADDITIONAL CONTACT INFORMATION for recipients of *The Ambachtsheer Letter (electronic version)*

Insert the contact information for additional people in your organization who wish to receive *The Ambachtsheer Letter (electronic version)*. There is no charge for additional electronic *Letter* recipients. Please attach a separate page if required.

Name of Recipient	Title of Recipient	Email Address
1)		
2)		
3)		
4)		
5)		
6)		
7)		
8)		
9)		
10)		

STEP 4 – AUTHORIZED SIGNATURE

I understand that *The Ambachtsheer Letter* is a proprietary publication; all rights are reserved and any materials are not to be copied or distributed without permission.

Signature of Authorized Representative: _____ Date: _____

*Should you have any questions,
Please contact Kalia German at 416 9257525 or kalia@kpa-advisory.com.*

**Please return this completed Form via email to Kalia German,
or via fax to 416 925 7377.**

