EdgePoint Wealth Management
Our Creed – The Partnership Commitments and Beliefs

We established EdgePoint Wealth Management with the goal of building wealth for our investors. In pursuit of this goal, we put in place a foundation of commitments which will govern our company. Our commitments, as well as the belief from which each commitment was born, are listed here:

01 We will put our investment partners (investors and their advisors) first in all business decisions

We believe that investors and their advisors should be treated as our investment partners. When faced with a decision, we will be guided by the belief that what matters is our investment partners and what's important to them.

02 We will consistently adhere to our investment approach

We believe in our deceptively simple investment approach: Buy good, undervalued businesses and hold them until the market recognizes their full potential. We believe this requires an ability to think independently and a commitment to embrace the thorough research that is required to uncover the opportunities that the market doesn't fully appreciate.

03 We will partner with financial advisors

We believe that investors should seek out professional financial advice. A skilled and principled financial advisor can offer effective advice in helping reach financial goals. We hope advisors will recommend EdgePoint but understand that they may not. We believe that's their value to their clients: independent objective advice.

04 We will focus on delivering superior service to our investment partners

We believe in the importance of highly responsive service, especially when you have entrusted us with your investments.

05 We will invest in our investment products alongside our investment partners

We believe that our employees should invest their personal wealth in the company's products. We believe that a personal commitment to products by employees fosters a strong sense of accountability and ensures that employees' interests are aligned with our investors'.

06 We will use investment results and not asset growth as our benchmark for achievement

We believe in the importance of being an investment-led organization as opposed to a sales and marketing-led firm. We believe the difference between these two types of organizations is material. A sales and marketing-led company spends more time and money gathering assets than they do investing the money they have already gathered. An investment-led organization focuses the majority of its efforts on building wealth.

07 We will build a distinct culture where our employees think and act like owners

We believe that employees who think and act like owners make better long-term decisions. We believe long-term thinking from our employees will enhance the long-term wealth of our investment partners.

08 We will communicate with our investment partners regularly and honestly

We believe informed investors and advisors make better decisions. We believe the ingredients of success in the wealth management business are investment results and reputation. We believe that the bond between both is setting expectations through open and honest communication.

09 We will endeavour to keep "it" simple

We believe achieving superior investment results is not simple. However, there are aspects of the investment management industry that have become unnecessarily complex. We will endeavour to keep our offerings, our company, and our interactions with our partners as simple as we can.