

NEW CLIENT AGREEMENT

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 Three Broad Areas

- Pension System Design
We seek ways to enhance pension system fairness, transparency and sustainability.
- The Governance of Pension Institutions
We seek ways to improve the institution’s mission clarity and organizational effectiveness.
- Pension Investing
Clear investment beliefs and their effective implementation generate higher long-term returns and more effective risk management.

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 each month of *The Ambachtsheer Letter*, our 4-page advisory letter that addresses our research and action steps. Our Advisory Service is based on the calendar year.

Through the Call Option, Clients have direct access to Keith Ambachtsheer either by phone or video conference* or via email, and may include a review of strategic documents. Clients are entitled to up to ½ day of Keith’s time, once within a calendar year. (* *phone/video conferences subject to fees*)

If a Client visit is required (for example, to attend Board/Investment Committee meetings or strategic planning sessions) additional travel and meeting time may be charged; fee will be negotiated based on a per diem rate of \$10,000 plus travel expenses. (*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.*)



2023 ADVISORY SERVICE AGREEMENT

SELECT YOUR ADVISORY SERVICE OPTION

Choose your Advisory Service Option:

1 Year Option:

2 Year Option:

\$6,000 (for calendar 2023) \$11,000 (for calendar 2023 & 2024)

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

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

DO NOT SEND PAYMENT AT THIS TIME.

PRIMARY CONTACT INFORMATION

Company Name				
Name of Primary Contact			Title	
Street Number	Street Name		Suite # (if applicable)	
City/Town	Province	Postal Code	Country	
Telephone	Fax	Email		

ASSISTANT INFORMATION

Assistant Name		Assistant Title		
Assistant Email		Assistant Phone		

BILLING INFORMATION

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

ADDITIONAL LETTER RECIPIENTS

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)		

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 Adilia Da Silva at 416 925-7525 or adilia@kpa-advisory.com.*

Please return this completed Form via email to Adilia Da Silva.

