

## 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.)





## 2024 ADVISORY SERVICE AGREEMENT

### SELECT YOUR ADVISORY SERVICE OPTION

Choose your Advisory Service Option:

1 Year Option:

2 Year Option:

\$6,000 (for calendar 2024)

\$11,000 (for calendar 2024 & 2025)

*(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

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

### ASSISTANT INFORMATION

<b>Assistant Name</b>		<b>Assistant Title</b>	
<b>Assistant Email</b>		<b>Assistant Phone</b>	

### BILLING INFORMATION

<b>Name of Billing Contact</b>		<b>Title of Billing Contact</b>		
<b>Street Number</b>	<b>Street Name</b>		<b>Suite # (if applicable)</b>	
<b>City/Town</b>	<b>Province</b>	<b>Postal Code</b>	<b>Country</b>	
<b>Telephone</b>	<b>Fax</b>	<b>Email</b>		

## 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](mailto:adilia@kpa-advisory.com).*

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

