

Investment Services for First Nations

Service. Investment. Performance.

- *Investment managers to institutions for over 20 years*
- *ESG investments, customized to the needs of your community*
- *Community finance seminars and workshops*
- *Worth Allaye-Chan Investment Counsel / Raymond James scholarships for Aboriginal students (three annually)*

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WORTH ALLAYE-CHAN
INVESTMENT COUNSEL

RAYMOND JAMES®

Raymond James Ltd., member Canadian Investor Protection Fund.

[Worth Allaye-Chan Investment Counsel](#) is an investment counsel operating within the open architecture of Raymond James, and we provide full service advisory and a full range of investment management for institutions, including First Nations. Our clients get the best of both worlds – truly independent investment management thinking, coupled with advisory skills honed through decades of client care.

We keep our client list small, select, focused on those who can benefit most from our approach, and we invest our own money right alongside theirs.

We are experienced managers of funds for cash management, of funds needed for projects and operations, investing for growth to benefit future generations, and to invest long term trust fund assets.

- Your assets and cash balances, held with us, are protected. The safeguarding of your assets is a top priority.
- We use a disciplined and repeatable approach to effectively and efficiently help us analyze a large universe of investment opportunities. Coupled with our macroeconomic research provides our clients with both the essential components of tactical asset selection and allocation.

- For more than 20 years, innovation has defined our team and forward thinking delivers performance for our clients.
- Your sensitivity to socially responsible investing issues can be dealt with diligently, whether it be seeking the best investments with emphasis on community values, customer and employee relations, environmental sustainability, and human rights, or avoiding nuclear power, weapons manufacturing, tobacco, alcohol, or other vice products.
- Our partner, [Raymond James](#), offers strength and stability along with the transparency of a publicly traded company.

We are proud to be [corporate members of AFOA](#) Canada and are committed to supporting educational programs for Aboriginal peoples. We offer three annual [bursaries](#) through the Indigenous Learning Centre, and are continuing, annual supporters of the Chief Joe Mathias British Columbia Aboriginal Scholarship Fund.

Our service package for First Nations includes:

- A no obligation and cost free analysis and recommendation of your existing strategy and investments,
- Consultation, review and updating of your existing investment policy or assistance in construction one suited to your community,
- Monthly statement reporting, quarterly performance reposting and online viewing access of your accounts.
- Investment education and workshops customized to the needs of your community or council.

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