

JANUARY 2025

TriCert Pooled Investment Funds

We are excited to announce that TriCert Investment Counsel Inc. will be launching its new pooled investment funds this month. This marks an exciting enhancement to how portfolios are managed and positioned for success.

Benefits of Pooled Investment Funds

This approach offers several advantages for investors, including:

- **Greater Diversification:** Access to a broader range of holdings for improved risk management.
- **Efficient Rebalancing:** More timely adjustments to maintain alignment with your investment goals.
- **Tactical Execution:** Faster implementation of TriCert's strategic asset allocation methodology.
- **Expert Oversight:** Greater access to the insights and expertise of TriCert's in-house management team.

What to Expect During the Transition

Your portfolio is expected to transition to the pooled investment funds this quarter. While this will change how your holdings are displayed in reports and statements, it's important to note:

- **No Change to Fees:** TriCert's management fees will remain the same.
- **No Change to Strategy:** Your portfolio will continue to be managed according to TriCert's personalized investment approach.

If you have any questions about this transition or how it impacts your portfolio, don't hesitate to reach out.