



E D G E P O I N T[®]

EDGEPOINT CREED

The partnership commitments and beliefs

We established EdgePoint to grow wealth for our investors. In pursuit of this goal, we put in place a foundation of commitments governing our company. Our commitments, as well as the belief from which each was born, are 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'll 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 required to uncover 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've 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 those of our investors.
- 06 We will use investment results and not asset growth as our benchmark for achievement**

We believe in the importance of being investment led as opposed to sales and marketing driven. 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 it does investing the money it has already gathered. An investment-led company 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 performance 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 performance isn't simple. Nevertheless, aspects of the investment management industry have become unnecessarily complex. We'll endeavour to keep our offerings, our company and our interactions with our partners as simple as we can.



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