STREAMLINING FUNDRAISING FOR PARENT ADVISORY COMMITTEES

THE NATIONAL BANK REFERRAL PROGRAM

The National Bank Financial (NBF) Referral Program provides a way for PACs to raise funds by leveraging relationships within their community and connecting individuals in need of wealth management advice with a trusted advisor.

By referring members of your community to National Bank Financial, your PAC, in turn, will receive a recurring referral fee of half of the Advisor's net remuneration from those referred clients. This creates a Triple Win scenario for all stakeholders:

PAC "WIN"	Community "WIN"	NBF Wealth Management "WIN"
✔ PAC has discovered another source of income.	✔ Parents can receive needed Wealth Management advice from the PAC approved Advisor.	✔ NBF aligns itself with established PACs that raise the Bank's profile in your community.
✔ PAC can add value back to its members.	✔ Parents give back indirectly to their child's school PAC by using a service they most likely already use, and often save money in fees.	✔ NBF continues to expand its wealth management offering and continues to achieve it's key priority of supporting children and education.

Guidelines for the program are as follows:

A written agreement between National Bank Financial and you (the referring PAC) is signed where both groups have a vested interest in the success of the client's investments. A fully transparent process is put in place that allows the PAC to receive an ongoing referral fee for three years after the client has been referred.

For more information about the program, please contact:

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1-888-233-0833 toll free

One of our Investment Advisors would be happy to attend one of your meetings or host a conference call to discuss the program in detail.

CIPF MEMBER

NATIONAL BANK FINANCIAL
WEALTH MANAGEMENT