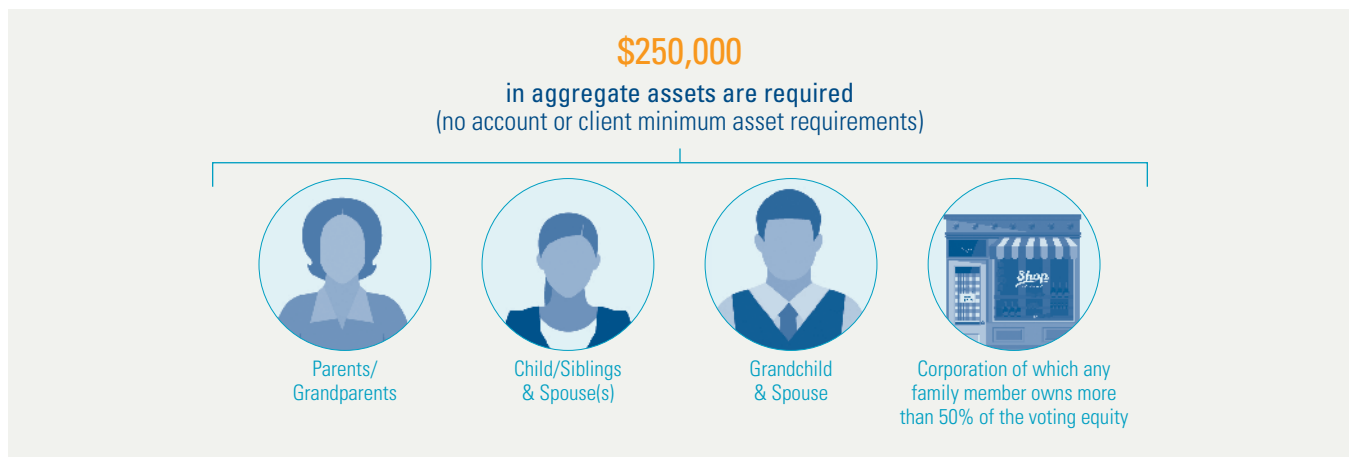


Extended family pricing

CI Preferred Pricing™ offers the benefit of linking family members' accounts together to benefit from greater pricing discounts.

An estimated \$750 billion¹ is expected to change hands over the next 10 years in the largest intergenerational wealth transfer in Canadian history. Use CI Preferred Pricing to help foster intergenerational relationships with your current clients and position you to assist in and benefit from the tremendous opportunity that this wealth transfer represents.



Creating a Family Group

Any combinations of the above family members are eligible to be linked within a single Family Group, along with their respective spouses.

Completion and submission of the Account Linking Form is all it takes.

- Family members are not required to reside at the same address.
- Corporate accounts may also be linked (where any family member owns a majority of the voting equity).
- All account types are eligible (i.e. registered, non-registered, joint, TFSA, RESPs, etc.).
- All accounts holding CI mutual funds and segregated funds can be linked to contribute to pricing tier determination.
(Note: labour-sponsored funds and closed-end funds do not contribute towards pricing tier determination.)
- Nominee and client-held account registrations can be linked to the same Family Group.
- Client signatures not required when linking for pricing purposes only.
- All accounts must belong to the same dealer and advisor code.

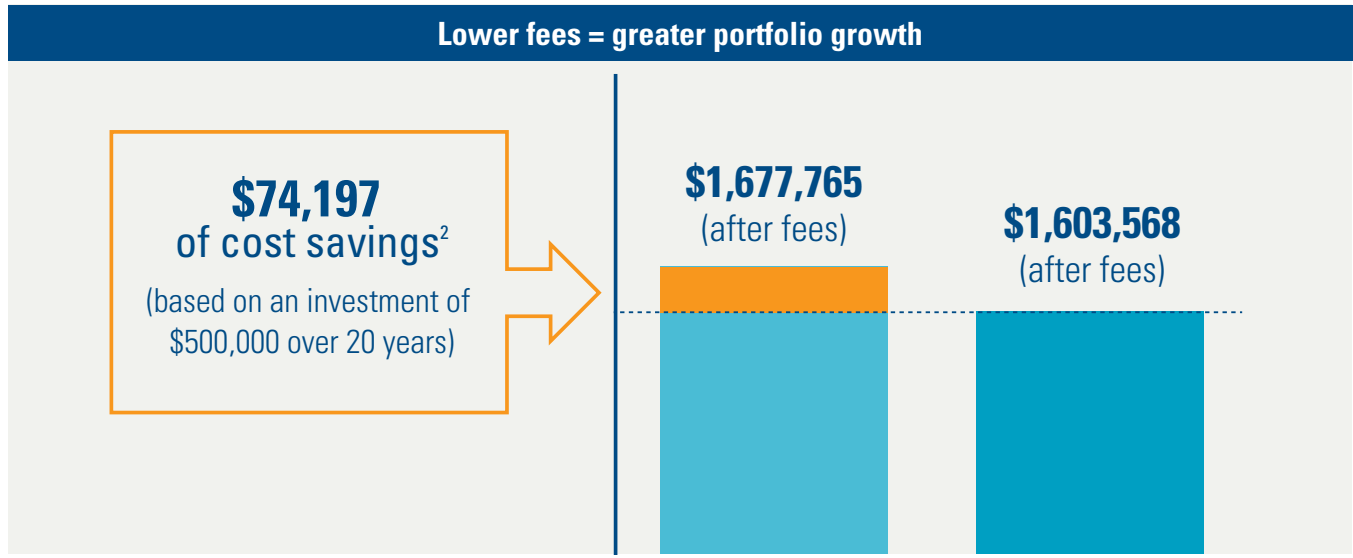
CI Preferred Pricing™



See the
enhanced
savings

See the enhanced savings from extended family linking

Robert and his wife Marie have \$250,000 of total qualifying investments. Their daughter and her husband also have \$250,000 in total qualifying investments. By opting for extended family linking of their accounts, they maximize their savings because the price discounts are based on their combined \$500,000 of qualifying Family Group assets.



¹CIBC report, June 2016.

²This hypothetical example of a \$500,000 investment is for illustrative purposes only. The \$74,197 in estimated fee savings reflects reduced investment management and administration fees available by investing in the Class F2 version of a fund with a management expense ratio (MER) of 1.10% compared to the Class F version of the same fund with a higher MER of 1.34%. The calculation assumes a net annualized return over the 20 years of 6.24% for the Class F2 fund and a net annualized return of 6% for the Class F version of the same fund over the same period. The \$74,197 in cost savings reflects the benefit of holding the lower MER class fund. Opportunities for additional fee savings are available by investing larger amounts and/or through linking additional accounts of eligible extended family members. The Class F2 version of Cambridge Asset Allocation Corporate Class has an estimated MER of 1.10% and the Class F version of the same fund had an MER of 1.34% as of September 30, 2016.

For more information on CI Preferred Pricing, please contact your
CI Sales Representative or visit: www.ci.com/preferredpricing.

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Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. The hypothetical example does not represent the return of any particular investment and the rate of return used is for illustrative purposes only and is not intended to reflect future values of a CI mutual fund or returns of an investment in a CI mutual fund. ©CI Investments, the CI Investments design and Cambridge are registered trademarks of CI Investments Inc. ™CI Private Wealth and CI Preferred Pricing are trademarks of CI Investments Inc. Cambridge Global Asset Management is a division of CI Investments Inc. Certain funds associated with Cambridge Global Asset Management are sub-advised by CI Global Investments Inc., a firm registered with the U.S. Securities and Exchange Commission and an affiliate of CI Investments Inc. Published April 2017.



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