

Established in 1952, PMAC represents 270+ portfolio managers, registered with the provincial securities commissions, that manage total assets in excess of \$2.75 trillion.

6 REASONS
to join now

- Advocacy
- Compliance Support
- Education & Networking
- Information Exchange
- Group Discount Programs
- Increased Profile

Compliance Support

- Monthly newsletters with regulatory and industry developments
- Access to PMAC's legal counsel for compliance support
- Bi-annual Compliance Benchmarking Survey
- Annual one-day Regulatory & Compliance Forums which take place in Vancouver, Montréal, and Toronto
- Compliance/legal networking groups and committees with presentations by industry experts, including by PMAC's 7 legal affiliates and 5 accounting affiliates, all leaders in their fields

Sample Policies/Templates & Information Exchange

Help your firm excel and remain abreast of regulatory changes through PMAC's member-only access to surveys, sample policies, and guidelines and best practices documents.

Resources include:

- Portfolio Manager - IIROC Dealer Services Agreement
- Reference Guide on Custody Disclosure
- Guide to AML Compliance
- Investment Management Agreement
- Investment Policy Statement
- Gifts and Entertainment Policy
- Personal Trading Best Practices Guidelines
- Guideline on Preparing an Annual CCO Report to the Board
- Guideline on Preparing a Business Continuity Plan
- Guide to Collecting and Maintaining KYC Information

- Principles of Corporate Governance
- PMAC Annual Compensation Survey
- PMAC Compliance Benchmarking Survey Report
- PMAC Supplier Inventory Survey

Group Discount Programs

PMAC members benefit from access to group discount programs with savings ranging from 10% to 15%, including:

- FIB and professional liability insurance
- Employee group benefit program through Great West Life
- Executive medical program through Medcan and affiliated clinics across Canada
- CFA preparation courses

[Check out](#) more PMAC member benefits.

Advocacy

PMAC offers a co-ordinated, industry-wide platform to communicate member views on federal and provincial government policy and securities, tax, pension and other regulation. Sub-committees meet regularly to discuss proposed changes to regulation and advocate for appropriate and effective regulatory solutions.

[View](#) the most recent PMAC submissions.

Education & Networking

We take our responsibility for “Advancing Standards” seriously. Members can join networking groups that focus on compliance, technology, legal, finance and HR. Annually we host CEO Dinners in Vancouver, Montréal and Toronto. In addition, PMAC also offers a variety of seminars, events, annual forums and conferences. The most recent topics include:

- Effective Communication and Strategies
- How to Manage Senior and Vulnerable Clients
- Consumer Disruption in the North American Food Sector
- Cannabis Analyst Event

- Preferred Shares – Landscape, Opportunities & Challenges
- Succession Planning & Execution

Increased Profile

Enhance your firm and personal brand by belonging to PMAC:

- One-page firm profile on PMAC website
- Use of PMAC's logo on your marketing materials, website and other client communications
- Serve your profession by participating on a committee
- Demonstrate that your firm is committed to "Advancing Standards"