



# **PORTFOLIO MANAGEMENT ASSOCIATION OF CANADA**

## **Affiliate Membership Directory**

PMAC is grateful to our Affiliate Members who support the Association through committee membership, event hosting, and sponsorship of events. These firms are leaders in their fields and focused in our industry.

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## Accounting Firms

### KPMG LLP

- **Address:** 333 Bay Street, Suite 4600, Toronto, Ontario
- **Website:** [www.kpmg.ca](http://www.kpmg.ca)
- **Phone:** 416-777-8500
- **Contact:**
  - **Joseph Micallef**, Partner, Tax – National Tax Leader Financial Services, [jmicallef@kpmg.ca](mailto:jmicallef@kpmg.ca)

### PricewaterhouseCoopers LLP

- **Address:** 18 York Street, Suite 2600, Toronto, Ontario
- **Website:** [www.pwc.com](http://www.pwc.com)
- **Phone:** 416-863-1133
- **Contact:**
  - **Chris Pitts**, Partner, Asset and Wealth Management Advisory Lead, [chris.pitts@pwc.com](mailto:chris.pitts@pwc.com)

### Shimmerman Penn LLP

- **Address:** 30 St. Clair Avenue West, Suite 400, Toronto, Ontario
- **Website:** [www.spllp.com](http://www.spllp.com)
- **Phone:** 416-964-7200
- **Contacts:**
  - **Elaine Pantel**, Partner, Assurance and Business Advisory, [epantel@spllp.com](mailto:epantel@spllp.com)
  - **Maj-Lis Vettoretti**, Managing Partner, [mvettoretti@spllp.com](mailto:mvettoretti@spllp.com)

## Consultants & Other

### Asset Risk Consultants Limited

- **Address:** 25 King Street West, Suite 2510, Toronto, Ontario
- **Website:** [www.assetrisk.com](http://www.assetrisk.com)
- **Phone:** 647-689-2618
- **Contact:**
  - **Andrew O'Neill**, Managing Director, [andrew.oneill@assetrisk.com](mailto:andrew.oneill@assetrisk.com)

### Baynes & White Inc.

- **Address:** 20 Eglinton Avenue West, Suite 1006, Toronto, Ontario
- **Website:** [www.bayneswhite.com](http://www.bayneswhite.com)
- **Phone:** 416-863-9159
- **Contact:**
  - **Pamela Martin**, Senior Consultant, [pmartin@bayneswhite.com](mailto:pmartin@bayneswhite.com)

### SGGG Fund Services Inc.

- **Address:** 121 King Street West, Suite 300, Toronto, Ontario
- **Website:** [www.sgggfsi.com](http://www.sgggfsi.com)
- **Phone:** 416-855-7247
- **Contact:**
  - **Dennis MacPherson**, Senior Vice President, [dmacpherson@sgggfsi.com](mailto:dmacpherson@sgggfsi.com)

## Custodians

### Aviso Correspondent Partners

- **Address:** 151 Yonge Street, Suite 1200, Toronto, Ontario
- **Website:** <https://www.aviso.ca/en/products-services/correspondent-institutional/>

- **Phone:** 604-209-2575
- **Contact:**
  - **Kevin Vanderheyden**, SVP, Head of Correspondent & Institutional, [kvanderheyden@aviso.ca](mailto:kvanderheyden@aviso.ca)

### CI Investment Services Inc.

- **Address:** 199 Bay St. Suite 2600, Toronto, Ontario
- **Website:** <https://www.ciinvestmentservices.com/>
- **Phone:** 416-235-0200
- **Contacts:**
  - **Deborah Carlyle**, Chief Business Development Officer [deborah.carlyle@bbssecurities.com](mailto:deborah.carlyle@bbssecurities.com)
  - **Carol Chiu**, President, CI Investment Services, [CChiu@ci.com](mailto:CChiu@ci.com)

### CIBC Mellon

- **Address:** 1 York Street, Toronto, Ontario
- **Website:** <https://www.cibcmellon.com>
- **Phone:** 416-643-5131
- **Contacts:**
  - **Brent Merriman**, Assistant Vice President, Corporate Communications and Marketing [brent.merriman@cibcmellon.com](mailto:brent.merriman@cibcmellon.com)
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  - **Mike Bean**, Director Information Technology, [mike.bean@cibcmellon.com](mailto:mike.bean@cibcmellon.com)

### Fidelity Clearing Canada ULC

- **Address:** 483 Bay Street, South Tower, Suite 200, Toronto, Ontario
- **Website:** [clearingcanada.fidelity.com](http://clearingcanada.fidelity.com)
- **Phone:** 416-216-2600
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  - **Lawrence McCann**, VP, Sales and Relationship Management, [lawrence.mccann@fidelity.ca](mailto:lawrence.mccann@fidelity.ca)

### Laurentian Bank Institutional Services

- **Address:** 1360 René-Lévesque Blvd. West, Montreal, Quebec
- **Website:** [www.vmbi.ca](http://www.vmbi.ca)
- **Phone:** 416-941-7716
- **Contact:**
  - **Fernando Moleirinho**, Vice President, Business Development, Institutional Services [MoleirinhoF@lb-securities.ca](mailto:MoleirinhoF@lb-securities.ca)
  - **Steve Ranco**, Manager, Institutional Services, [RancoS@vmbi.ca](mailto:RancoS@vmbi.ca)

### National Bank Independent Network (NBIN)

- **Address:** 130 King Street West, Suite 3000, Toronto, Ontario
- **Website:** <https://www.nbin.ca/>
- **Phone:** 416-542-2466
- **Contact:**
  - **Cara Benvenuti**, Senior Advisor, [cara.benvenuti@bnc.ca](mailto:cara.benvenuti@bnc.ca)

### Northern Trust Company, Canada

- **Address:** 145 King Street West, Suite 1910, Toronto, Ontario
- **Website:** [www.northerntrust.com](http://www.northerntrust.com)
- **Phone:** 416-775-2209

- **Contact:**
  - **Descia Milinkovich**, Senior Vice President, Business Development, [descia.milinkovich@ntrs.com](mailto:descia.milinkovich@ntrs.com)

### **Pinnacle Correspondent Services**

- **Address:** 609 Granville Street, Suite 2200, Vancouver, British Columbia
- **Website:** [www.pcsc.ca](http://www.pcsc.ca)
- **Phone:** 604-643-7300
- **Contact:**
  - **Dmitri Kondratev**, Manager, Relationship Team, [dmitri.kondratev@pcsc.ca](mailto:dmitri.kondratev@pcsc.ca)

### **Raymond James Ltd.**

- **Address:** 40 King Street West, Suite 5300, Toronto, Ontario
- **Website:** [www.raymondjames.ca](http://www.raymondjames.ca)
- **Phone:** 416-777-7000
- **Contact:**
  - **David Burnes**, Senior Vice President, Correspondent Services, [david.burnes@raymondjames.ca](mailto:david.burnes@raymondjames.ca)

### **RBC Investor & Treasury Services**

- **Address:** 155 Wellington Street West, Street Level, Toronto, Ontario
- **Website:** [www.rbcits.com](http://www.rbcits.com)
- **Phone:** 416-955-5055
- **Contact:**
  - **David Linds**, Managing Director, Head of Asset Servicing Canada, [david.linds@rbc.com](mailto:david.linds@rbc.com)

### **State Street Global Services**

- **Address:** 30 Adelaide Street East, Suite 1100, Toronto, Ontario
- **Website:** [www.statestreet.com](http://www.statestreet.com)
- **Phone:** 647-775-5923
- **Contact:**
  - **Robyn Thompson**, Head of Canadian Asset Management Segment & Relationship Management, [rthompson5@statestreet.com](mailto:rthompson5@statestreet.com)

## **Insurance**

### **Chubb Insurance Company of Canada**

- **Address:** 199 Bay Street, Suite 2500, Toronto, Ontario
- **Website:** [www.chubb.com](http://www.chubb.com)
- **Phone:** 416-359-3222; 1-800-268-9344
- **Contact:**
  - **Carol McLellan**, Vice President, Financial Lines, [cmclellan@chubb.com](mailto:cmclellan@chubb.com)

### **HUB International HKMB Limited**

- **Address:** 595 Bay Street, Suite 900, Toronto, Ontario
- **Website:** [www.hkmb.com](http://www.hkmb.com)
- **Phone:** 416-597-7702; 1-800-232-2024
- **Contact:**
  - **Matthew Studley**, Senior Vice President, Executive & Specialty Liability [matthew.studley@hubinternational.com](mailto:matthew.studley@hubinternational.com)

## Legal & Compliance Support Firms

\*Many of the law firms listed below provide both law and compliance support; ask the provider for further details.

### Legal

#### **AUM Law Professional Corporation**

- **Address:** 110 Yonge Street, Suite 400, Toronto, Ontario
- **Website:** [www.aumlaw.com](http://www.aumlaw.com)
- **Phone:** 416-966-2004
- **Contact:**
  - **Kevin Cohen**, Chief Executive Officer, [kcohen@aumlaw.com](mailto:kcohen@aumlaw.com)

#### **Babin Bessner Spry LLP**

- **Address:** 185 Frederick Street, Suite 101, Toronto Ontario
- **Website:** [www.babinbessnerspry.com](http://www.babinbessnerspry.com)
- **Phone:** 416-408-3999
- **Contact:**
  - **Ellen Bessner**, Partner, [ebessner@babinbessnerspry.com](mailto:ebessner@babinbessnerspry.com)

#### **Borden Ladner Gervais LLP**

- **Address:** Bay Adelaide Centre, East Tower, 22 Adelaide Street West, Suite 3400, Toronto, Ontario
- **Website:** [www.blgcanada.com](http://www.blgcanada.com)
- **Phone:** 416-367-6400; 1-855-660-6003
- **Contact:**
  - **Rebecca A. Cowdery**, Partner, [rcowdery@blg.com](mailto:rcowdery@blg.com)

#### **Fasken Martineau DuMoulin LLP**

- **Address:** Bay Adelaide Centre, West Tower, 333 Bay Street, Suite 2400, Toronto, Ontario
- **Website:** [www.fasken.com](http://www.fasken.com)
- **Phone:** 416-868-3422
- **Contact:**
  - **Garth J. Foster**, Partner, [gfoster@fasken.com](mailto:gfoster@fasken.com)

#### **McCarthy Tétrauit LLP**

- **Address:** TD Bank Tower, 66 Wellington Street West, Suite 5300, Toronto, Ontario
- **Website:** [www.mccarthy.ca](http://www.mccarthy.ca)
- **Phone:** 416-601-8200
- **Contact:**
  - **Sean D. Sadler**, Partner, [ssadler@mccarthy.ca](mailto:ssadler@mccarthy.ca)

#### **McMillan LLP**

- **Address:** Brookfield Place, 181 Bay Street, Suite 4400, Toronto, Ontario
- **Website:** [www.mcmillan.ca](http://www.mcmillan.ca)
- **Phone:** 416-865-7000
- **Contact:**
  - **Jason A. Chertin**, Partner, Investment Funds & Asset Management  
[jason.chertin@mcmillan.ca](mailto:jason.chertin@mcmillan.ca)

#### **Osler Hoskin & Harcourt LLP**

- **Address:** 100 King Street West, 1 First Canadian Place, Suite 6200, Toronto, Ontario
- **Website:** <https://www.osler.com>
- **Phone:** 416-362-2111

- **Contact:**
  - **John A. Black**, Partner, Corporate, [jblack@osler.com](mailto:jblack@osler.com)

### **WeirFoulds LLP**

- **Address:** TD Bank Tower, 66 Wellington Street West, Suite 4100, Toronto, Ontario
- **Website:** [www.weirfoulds.com](http://www.weirfoulds.com)
- **Phone:** 416-365-1110
- **Contact:**
  - **Susan Han**, Partner, [shan@weirfoulds.com](mailto:shan@weirfoulds.com)

## **Compliance**

### **Ara Compliance Support**

- **Address:** 130 King Street West, Suite 1800, Toronto, Ontario
- **Website:** [www.aracompliance.com](http://www.aracompliance.com)
- **Phone:** 416-941-1263
- **Contact:**
  - **Vipool Desai**, President, [vpool@aracompliance.com](mailto:vpool@aracompliance.com)

### **Canadian Compliance & Regulatory Law**

- **Address:** 257 Wharton Boulevard, Winnipeg, Manitoba
- **Website:** [www.cdnrcr.ca](http://www.cdnrcr.ca)
- **Phone:** 204-297-9338
- **Contact:**
  - **Don Campbell**, Principal, [dcampbell@cdnrcr.ca](mailto:dcampbell@cdnrcr.ca)
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### **Comarm Solutions Inc.**

- **Address:** 8 King Street East, Suite 1105, Toronto, Ontario
- **Website:** [www.comarm.com](http://www.comarm.com)
- **Phone:** 416-304-9482
- **Contact:**
  - **Leo Purcell**, President & CEO, [leopurcell@comarm.com](mailto:leopurcell@comarm.com)

### **SGD Compliance Consulting**

- **Address:** 1932 Northfield Close, Bright's Grove, Ontario
- **Website:** [www.sgdcompliance.ca](http://www.sgdcompliance.ca)
- **Phone:** 647-967-5980
- **Contacts:**
  - **Laura Bewick Howitt**, Founder and Managing Consultant, [laura@sgdcompliance.ca](mailto:laura@sgdcompliance.ca)
  - **Kathy Ferguson**, Senior Principal Regulatory Consultant, [kathy@sgdcompliance.ca](mailto:kathy@sgdcompliance.ca)

### **Trinity Compliance Partners Inc.**

- **Address:** 100 King Street West, Suite 5600, Toronto, Ontario
- **Website:** [www.trinitycompliancepartners.com](http://www.trinitycompliancepartners.com)
- **Phone:** 416-306-5783
- **Contacts:**
  - **Andrew Rhee**, Director, [arhee@trinitycompliancepartners.com](mailto:arhee@trinitycompliancepartners.com)
  - **Dave Santiago**, Director, [dsantiago@trinitycompliancepartners.com](mailto:dsantiago@trinitycompliancepartners.com)



# Technology Solution Partners

## **aosphere LLP**

- **Address:** 1221 Avenue of the Americas, New York, NY, USA
- **Website:** <https://www.aosphere.com/>
- **Phone:** (646) 629 9308
- **Contact:**
  - **Charlotte Hayward**, Senior Business Development Manager, [charlotte.hayward@allenoverly.com](mailto:charlotte.hayward@allenoverly.com)

## **Archer Investment Management Solutions**

- **Address:** 801 Cassatt Rd. Suite 212, Berwyn, Pennsylvania 19312
- **Website:** <https://www.archerims.com/>
- **Phone:** 484-615-6271
- **Contacts:**
  - **Matthew Caulfield**, Executive Vice President, [mcaulfield@archerims.com](mailto:mcaulfield@archerims.com)
  - **Jon Anderson**, Marketing and Solutions, [janderson@archerims.com](mailto:janderson@archerims.com)

## **Broadridge Financial Solutions, Inc.**

- **Address:** 4 King Street West, 5<sup>th</sup> Floor, Toronto, Ontario
- **Website:** <https://www.broadridge.com/ca/>
- **Phone:** 416-350-0999
- **Contacts:**
  - **Carol Penhale**, Managing Director, Advisory and Consulting, [carol.penhale@broadridge.com](mailto:carol.penhale@broadridge.com)

## **Cancheck Corporation**

- **Address:** First Canadian Place, 100 King Street West, Suite 5700, Toronto, Ontario
- **Website:** <https://cancheck.com/>
- **Phone:** 416-848-0870
- **Contacts:**
  - **Ian Clark**, Principal, [ian.clark@cancheck.com](mailto:ian.clark@cancheck.com)
  - **Laurie Clark**, Founder, Director and Principal, [laurie.clark@cancheck.com](mailto:laurie.clark@cancheck.com)

## **Croesus Finansoft**

- **Address:** 600 Boul. Armand-Frappier, Laval, Quebec
- **Website:** [www.croesus.co](http://www.croesus.co)
- **Phone:** 450-662-6101
- **Contacts:**
  - **Laurent Simpson**, [Laurent.simpson@croesus.com](mailto:Laurent.simpson@croesus.com)

## **FactSet Research System Inc.**

- **Address:** 22 Adelaide St. W, Suite 3730, Toronto, Ontario
- **Website:** <https://www.factset.com/>
- **Phone:** 647-749-1300
- **Contacts:**
  - **Gordon Wright**, Principal Sales Rep – Canada, [gordon.wright@factset.com](mailto:gordon.wright@factset.com)

## **Fundata Canada Inc.**

- **Address:** 38 Lesmill Road, Toronto, Ontario
- **Website:** [www.fundata.com](http://www.fundata.com)
- **Phone:** 416-445-5534

- **Contacts:**
  - **Denny Doljac**, Relationship Manager, [denny.doljac@fundata.com](mailto:denny.doljac@fundata.com)

### **Infinite Investment Systems Ltd.**

- **Address:** TD North Tower, 77 King Street West, Suite 4330, Toronto, Ontario
- **Website:** [www.inf-systems.com](http://www.inf-systems.com)
- **Phone:** 416-861-0911
- **Contacts:**
  - **Mike Zegers**, Vice President, Strategy and Business Development, [mike.zegers@inf-systems.com](mailto:mike.zegers@inf-systems.com)

### **SS&C / Advent**

- **Address:** 600 Townsend Street, Suite 500. San Francisco, California, USA
- **Website:** [www.advent.com](http://www.advent.com)
- **Phone:** 415-645-1632
- **Contacts:**
  - **Jamie Baker**, Manager, Marketing Operations, [jbaker@sscinc.com](mailto:jbaker@sscinc.com)
  - **Elizabeth Kreidman**, Senior Manager, Marketing, [ekreidma@sscinc.com](mailto:ekreidma@sscinc.com)



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