



Partnering for Success

About AGF Investments

AGF Investments is comprised of various subsidiaries of AGF Management Limited (AGF) who manage and advise on a variety of investment solutions for clients globally. AGF Investments' disciplined approach, global mindset and eye to risk management have allowed us to continue to evolve and thrive as a diversified asset manager.

Our Mission: Bringing stability to the world of investing since 1957.



Global asset manager servicing a broad range of clients.



Diversified investment capabilities – fundamental, quantitative, and alternatives across public and private markets.



Disciplined approach aimed to deliver consistent investment performance.

AGF Investments offers a broad range of actively managed equity, fixed income, alternative and multi-asset strategies covering a spectrum of objectives from wealth accumulation and risk management to income-generating globally-focused solutions.

Our teams embrace a culture of collaboration and knowledge sharing with the belief that an interconnected team leads to a better understanding of an interconnected world as we work to consistently deliver on investment objectives and provide an exceptional client experience.

25

Portfolio Managers*

25+

Analysts*

15+

Investment Professionals*

* AGF Investments teams consist of individuals from across AGF Investments entities. See disclaimers for further information.

Proud Strategic Partnership

Since 1996, AGF Investments and Primerica have built a strong strategic partnership, united by a shared purpose of helping Canadian families achieve long-term financial success. AGF remains committed to supporting Primerica Representatives and their clients with the resources, insights and expertise needed to navigate an evolving investment landscape. AGF offers a wide range of tools and resources designed to support client conversations and help deliver positive outcomes.

70

years AGF Investments has been seeking to deliver excellence in investment management

40

years Primerica has been supporting Canadian families with financial services

30

years AGF Investments has had a proud strategic partnership with Primerica

Source: AGF Investments as of June 30, 2026.

Tools and Resources

Advisor Education

Programs designed to help Representatives grow their business, strengthen client relationships, and build professional expertise.

Value of Advice Training Program

Provides practical, high-impact insights to help you grow your business, retain clients, and clearly articulate your value.

AGF Transitions Program (CE eligible)

A comprehensive suite of courses for MFDA- and life-licensed Representatives, covering key areas that support advisors across the client lifecycle.

Investor Education

Guides to help your clients build investment.

Quick Reference Guide

Educate clients on investing concepts that help investors meet their financial goals, both during the accumulation and decumulation phases.

Registered Plans Guide

Help your clients understand the different types of investment accounts to help them make informed financial decisions.

Market Insights & Events

Timely market commentary and expert perspectives to help inform client conversations.

Capitol Signals Newsletter

Weekly insights from Henrietta Treyz exploring how U.S. policy and political developments may impact global markets.

AGF Perspectives Newsletter

A weekly round-up of AGF's thought leadership, including AGF's podcast series.

AGF Market Update Webcast (CE eligible)

A webcast series where AGF Investments' experts share timely market insights, global market perspectives, and asset allocation views.

AGF Fund Update Webcast (CE eligible)

Join AGF's Investment Management team for updates on key funds, portfolio positioning, and the market and investment trends influencing performance.

Annual AGF Roadshow (CE eligible)

Join AGF leaders as they share strategies and insights to help you and your clients thrive.

Subscribe at [AGF.com/Subscribe](https://www.agf.com/Subscribe).

*Continuing Education (CE) credits may be available for eligible events and programs, pending accreditation approval.

Key Contacts

We continue to deliver new and enhanced investment and technology capabilities.

My Messages – A secured inbox for important operational messages regarding your AGF Investments client accounts.

Canada Securities TurboApps – A digital tool allowing efficient account openings and Know Your Client (KYC) updates.

AGF Investor Services – Dedicated helpdesk support to answer your operational questions regarding your AGF Investments client accounts.

- AGF Platform Funds (Series P) 1-888-226-2024
- AGF Funds (Series MF) 1-800-268-8583
- Common Sense Funds 1-800-463-9997
- Concert Funds 1-800-510-7375
- AGF Groups 1-800-240-6934

Get the support and information you need by contacting [AGF's Sales Team](#) [Login required].



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Commissions, trailing commissions, management fees and expenses all may be associated with investment fund investments. Please read the prospectus before investing. Investment funds are not guaranteed, their values change frequently and past performance may not be repeated.

Common Sense Funds segregated fund products are underwritten by Primerica Life Insurance Company of Canada.

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