Helium Investments of Canada
8 Budgell Terr, Suite H
Toronto, Ontario, M6S 1B4
support@heliuminvestments.com / 1-877 8 Helium

Head Office

Investment Policy Statement

The investments in your account are made up of Model Portfolios as defined in the Portfolios section of our website. These portfolios carry an expected return and have a risk level associated with them. Your investment policy is made of up one or multiple Model Portfolios along with the information you provided during signup.

Your Investor Profile
Is made up of your basic personal information like age, marital status and income. Along with finance related information such as outstanding debt, net worth, majority stake holder etc that helps us build your risk tolerance, and your answers to our risk appetite questionnaire.

All of these metrics are used to select your risk adjusted Model Portfolio.

Accessing or changing your Investor Profile
Your profile can be changed online from within your Dashboard there is a Settings link. Inside Settings you will find your Profile information, along with your Suitability information. Changing your investor profile may change the Model Portfolio associated with your Investor Profile.

Your Investment Objectives
Most investment objectives are to accumulate wealth with minimal risk. Depending on the answers you provided during signup, your Investment Objectives will differ from another client. You can discuss your investment objectives to ensure they match your Model Portfolio at any time by messaging an Advisor from your Dashboard, or calling us at 1-877 8-Helium.

Investing Time Horizon
The longer your time horizon the greater likelihood you will reach your Investment Objectives. Time Horizons do vary with Investment Objectives.

Risk Tolerance
Our Model Portfolios have been backtested and are risk adjusted. Each portfolio uses standard risk measurement techniques and has a risk rating of 1-5 associated with them. 1 Being the least risky and 5 being the most. You need to be aware of the level of risk you can tolerate as this may differ from the perceived level of risk tolerance and risk appetite we could discern from your online client profile created during signup. If you would like to change the associated model portfolio with your account you may do so at any time from within your Dashboard or by calling 1-877 8-Helium.

Your Portfolio
Can be viewed online at anytime and will most likely be one of the risk adjusted model portfolios available to you. The makeup of each portfolio is available on our website. The exact makeup of your portfolio is available from within your Dashboard in the Portfolio section. From time to time the model portfolios may be adjusted and changed and the version in your account may not be necessarily the version being offered today for new accounts. You can discuss your option about changing your model portfolio at any time by speaking with an advisor.

Statements
Are generated and store in your Dashboard monthly. You do have the option of receiving a paper statement, which can be enabled from within your Dashboard in Settings and then Statements. These statements will contain your current holdings, the gain or loss for the statement period and any fees associated with the management of your account.

Acceptance of this IPS
Means that you acknowledge the following:
You understand the information pertained in this IPS.
The Model Portfolio selected by us reflects the level of risk you are looking to accept and matches your investment objectives.
There is no guarantee the value of your portfolio will increase in time.