



PRESS RELEASE

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## NEI Investments Announces Risk Rating Change for NEI Income & Growth Private Portfolio

TORONTO, January 11, 2024 – NEI Investments (“NEI”) today announced a change to the risk rating for NEI Income & Growth Private Portfolio, effective today. This change is in accordance with the Risk Classification Methodology mandated by the Canadian Securities Administrators (CSA). There is no change to the risk rating of the other NEI Private Portfolios or the investment objectives of the fund associated with the new risk rating.

<b>Fund</b>	<b>Previous risk rating</b>	<b>New risk rating</b>
NEI Income & Growth Private Portfolio	Low Risk	Low to Medium Risk

A summary of the CSA’s Risk Classification Methodology and the investment objectives and strategies of the investment funds can be found in the amendment to NEI Investments Simplified Prospectus, which is available at [www.neiinvestments.com](http://www.neiinvestments.com), [www.sedarplus.ca](http://www.sedarplus.ca), or by contacting us at 1-888-809-333.

### **About NEI Investments**

NEI Investments is a Canadian asset manager specializing in responsible investing, with over \$10 billion under management. With over 30 years of firm experience, NEI is committed to providing Canadian investors with a broad range of responsible investment solutions. The company delivers disciplined, active asset management with a focus on environmental, social, and governance (ESG) factors. NEI Investments also manages and operates a proprietary active ownership program, and has been a signatory of the United Nations' Principles for Responsible Investment for more than 15 years. NEI Investments is a wholly owned subsidiary of Aviso Wealth.

### **About Aviso Wealth**

Aviso Wealth is a leading wealth services supplier for the Canadian financial industry, helping hundreds of institutional and retail organizations gain a competitive edge through a comprehensive offering of investment dealer and insurance services supporting thousands of financial advisors across Canada. Aviso Wealth’s asset manager, NEI Investments, is a Canadian leader in responsible investment funds and portfolios, and its award-winning online brokerage, Qtrade Direct Investing™, enables self-directed investors to build their wealth with confidence. Aviso Correspondent Partners provides custodial and carrying broker services to portfolio managers, investment dealers, insurance and trust companies, and introducing brokers.

With over \$105 billion in assets under administration and management, Aviso Wealth is an ambitious organization backed by the collective strength of its owners: the credit union Centrals,



Co-operators/CUMIS, and Desjardins. For more information visit [aviso.ca](http://aviso.ca).

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.

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For more detail on the modifications described in this media release, please refer to NEI's prospectus at [www.neiinvestments.com](http://www.neiinvestments.com). The amendment to the prospectus was filed today on SEDAR+.

NEI Investments is a registered trademark of Northwest & Ethical Investments L.P. ("NEI LP"). Northwest & Ethical Investments Inc. is the general partner of NEI LP and a wholly-owned subsidiary of Aviso Wealth Inc. ("Aviso"). Aviso is the sole limited partner of NEI LP. Aviso is a wholly-owned subsidiary of Aviso Wealth LP, which in turn is owned 50% by Desjardins Financial Holding Inc. and 50% by a limited partnership owned by the five Provincial Credit Union Centrals and The CUMIS Group Limited.