



## **NEI announces change to its leadership team**

TORONTO, July 23, 2025 – NEI Investments (NEI) today announced that Adelaide Chiu, VP, Head of Responsible Investing, departed the organization on July 14, 2025.

Her responsibilities as portfolio manager of certain NEI funds have been assumed by John Bai, Chief Investment Officer, effective July 14, 2025.

## **About NEI**

NEI Investments is part of the asset management arm of Aviso Wealth Inc. (Aviso), one of Canada's leading wealth services providers. NEI holds over \$13 billion in assets under management as of June 30, 2025.

NEI adopts a differentiated approach to achieving investment returns for Canadians, leveraging a unique structure that includes a global network of money managers, proprietary investment management and asset allocation and a dedicated responsible investing team. This structure is designed to optimally respond to the dynamics of a changing world, uncover unique investment opportunities, and deliver a broad array of investment outcomes with financial growth at the core.

## **About Aviso**

Aviso is a leading wealth management services provider for the Canadian financial industry, with approximately \$150 billion in total assets under administration and management as of June 30, 2025. We're building a technology-enabled, client-centric wealth management ecosystem. Our clients include our partners, advisors and investors. We're a trusted partner for nearly all credit unions across Canada, in addition to a wide range of portfolio managers, investment dealers, insurance and trust companies, and introducing brokers. Our partners depend on Aviso for specific solutions that give them a competitive edge in a rapidly evolving, highly competitive industry. Our dual-registered investment and mutual fund dealer and our insurance services support thousands of investment advisors. Our asset manager oversees a growing lineup of investment solutions, including NEI funds and portfolios. Our Managed Assets Program provides a comprehensive range of separately managed accounts. Our online brokerage, Qtrade Direct Investing®, empowers self-directed investors, and our fully automated investing service, Qtrade Guided Portfolios®, serves investors who prefer a hands-off approach. Aviso Correspondent Partners provides custodial and carrying broker services to a wide range of firms. Aviso is backed by the collective strength of our owners: the credit union Centrals, Desjardins, and Co-operators/CUMIS. We're proud to power businesses that empower investors. For more information visit [aviso.ca](https://aviso.ca).

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. The following entities are subsidiaries of Aviso: Aviso Financial Inc. (including divisions Aviso Wealth, Qtrade Direct Investing, Qtrade Guided Portfolios, Aviso Correspondent Partners), Aviso Insurance Inc., Credential Insurance Services Inc. and Northwest & Ethical Investments L.P. 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. Online brokerage services are offered through Qtrade Direct Investing. Mutual funds and other securities are offered through Aviso Wealth. Qtrade Direct Investing, Qtrade Guided Portfolios, Aviso Correspondent Partners, and Aviso Wealth are divisions of Aviso Financial Inc.

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