

## Guidance and Client-Centric Contact: Key Drivers for the DIY Investor

**MARKHAM, ON – (January 10, 2019)** – As more and more self-directed investors seek guidance and information, client-centric contact has become the key driver of client satisfaction. As such, BMG Group Inc. (BMG) is pleased to announce the launch of [BMG DIY Investor](#), a resource for Canadians who are already knowledgeable investors as well as for those new to savings and investing, and for those who want to learn more about investment options and establishing their own financial plan.

*“Launching Class D units across our mutual fund lineup in 2018 demonstrates our commitment to providing investors with effective solutions to best meet their investment needs,” said Nick Barisheff, CEO and president of BMG. “As such, this website seeks to increase levels of financial literacy and demystify the jargon around investment products. We believe all investors – whether the vast majority who choose to invest with the help of an advisor, or the few who choose to go it alone – deserve fair value at all times. While every investor differs in terms of their personal circumstances, risk appetite and desired outcome, there are some fundamental considerations that should underpin any DIY investment strategy, and that is where this website comes in.”*

### Why BMG Launched Series D - Better for Investors

Series D funds are sold exclusively through the discount brokerage channel. They are priced at a discount to advisor-sold funds through a reduction in the dealer service fee to reflect that do-it-yourself (DIY) investors are choosing not to receive advice. For example, in a Series A mutual fund, service fees cover dealer administrative costs and advisor compensation. That means DIY investors who want to use our funds currently have to pay for advice they are not using. We do not think this is fair, and that is why we decided to open [BMG Series D funds](#).

We also believe offering Series D will have another important benefit: the future health of our industry. Our industry’s regulators continue to engage us in dialogues around issues like clarity, transparency and fairness. On those issues, we share the goal of our regulators: providing fair alternatives for investors is the right thing to do. And by taking concrete action on Series D to correct an obvious inequity, we’re demonstrating our ongoing commitment to fair treatment of investors. We believe that will carry weight in future discussions with our regulators on matters that affect our industry.

Our primary focus has always been on supporting both the advice given and the advisors who provide this essential service to their clients. We will continue to promote and support this practice for investors. Helping ensure strong client advisory services is also doing what's right.

### **About BMG**

Founded in 2002, BMG is a dedicated guardian of physical bullion. BMG is based in Markham, Ontario, Canada. The company offers a wide range of physical bullion products designed for portfolio diversification and wealth preservation. BMG bullion products are stored on an allocated and insured basis within London Bullion Market Association (LBMA)-member vaults. BMG was the first precious metals bullion management company in Canada to become an Associate Member of the LBMA, an honour it shares with the Royal Canadian Mint, the Crown Corporation that produces Canada's currency. This validation and endorsement is only bestowed upon firms that meet the LBMA's rigorous industry standards on refining, reliable trading and Good Delivery practices. BMG is an associate member of the Responsible Investment Association (RIA) and a signatory to the Principles of Responsible Investment (PRI). The PRI is the world's leading proponent of responsible investment.

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