Worldsource Wealth Management to bring Conquest Planning's intuitive financial planning platform to advisors

Worldsource will offer platform as an enterprise-wide solution to entire Wealth Management segment

MARKHAM, Ontario, December 14, 2021 – Worldsource Wealth Management Inc. (Worldsource), a subsidiary of Guardian Capital Group Limited (Guardian), announced today that it has reached an agreement with Conquest Planning (Conquest) that allows advisors across its organization to utilize Conquest's industry-leading financial planning solution.

Under the partnership, Guardian will offer Conquest as an enterprise-wide solution to their entire Wealth Management segment, initially focused on Worldsource's MFDA and IIROC platforms and Managing General Agency (MGA) IDC Worldsource Insurance Network Inc. (IDC WIN). This will then expand to Guardian Capital Advisors LP, Guardian Partners Inc. and ModernAdvisor Canada Inc. The agreement also makes IDC WIN the first MGA to formally partner with Conquest.

"At Worldsource, we created the Independent Dealer Model for advisors and corporate clients who value flexibility and their clients' desire for collaboration and enhanced transparency," said Doce Tomic, President and Chairman, Worldsource. "Leveraging Conquest's flexible platform will allow our advisors to easily create personalized financial plans for their clients that are adaptable to their changing needs. We believe this agreement will help us build a more cohesive wealth ecosystem within our organization, and demonstrate our commitment towards creating best-in-class digital solutions."

"When we developed our software, our main goal was to help improve the financial wellbeing of those we serve by enabling frictionless delivery of sound financial advice," said Mark Evans, CEO of Conquest Planning. "We are thrilled to partner with Guardian at the enterprise level to support financial advice delivery, providing our technology to more advisors and ultimately resulting in more families with improved financial wellness."

Conquest Planning offers financial planning software that enables advisors to model scenarios and create detailed financial plans collaboratively with their clients. It leverages AI and an open API to create custom solutions for clients, empowering them to create personalized plans faster and more efficiently than ever before.

"There is so much about this partnership that aligns with our history of innovation in the financial industry," said Mr. Tomic. "Whether it's the platform's use of artificial intelligence to help advisors find the right balance for specific clients, or its ability to model multiple strategy combinations, we are extremely excited about the opportunities it offers our advisors and their clients. This is one of many innovations we will be adding to our digital ecosystem in 2022 for our partners' benefit."

"Wealth management is evolving rapidly, and at Worldsource, we're looking to lead the way. Today's announcement is just another example of that."

About Worldsource Securities Inc.

Worldsource Wealth Management Inc. (WWM) is a fully integrated wealth management company focused on building financial prosperity, and a wholly-owned subsidiary of Guardian Capital Group Limited, a diversified financial services company founded in 1962. It is comprised of: Worldsource Financial Management Inc. (WFM), an independent mutual fund dealer regulated by the Mutual Funds Dealer Association of Canada (MFDA); Worldsource Securities Inc. (WSI), a full-service investment dealer and a Member of the Investment Industry Regulatory Organization of Canada (IIROC) and CIPF (Canadian Investor Protection Fund); and IDC Worldsource Insurance Network Inc. (IDC WIN), one of Canada's largest life insurance managing general agencies.

For more information about Worldsource Wealth Management, please visit: www.worldsourcewealth.com/worldsource-wealth-management.

About Conquest Planning

Conquest Planning is Canada's leading financial planning software company with a purpose-driven approach to delivering financial advice. The company is built on the foundational belief that every single person deserves access to great financial advice. Users of Conquest Planning leverage the intuitively designed product, simple onboarding process, and data driven artificial intelligence to accelerate the delivery of beautifully designed hyper-customized financial plans. Established in 2018, Conquest Planning was founded by a team of FinTech veterans whose track record of success spans over 30 years in the financial planning software space.

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