

Procedure Name	Investments		
Procedure #	521	Category	GOVERNANCE
Steward	Board of Governors	Date Approved	February 26, 2026
Next Review Date		Date Reviewed or Revised	

PROCEDURES

1. Investments are subject to approval by the Minister of Advanced Education.
2. The Executive Committee shall oversee the implementation of the investment policy and review performance reports quarterly.
3. The Vice President, Corporate Services is responsible for executing investment decisions in accordance with the approved asset allocation and permitted instruments.
4. Investment performance and compliance shall be reported to the Board of Governors on a semi-annual basis, with an annual summary provided during the budget cycle.
5. The investment policy shall be reviewed annually to ensure alignment with institutional goals, market conditions, and regulatory requirements.
6. All investments shall be monitored for compliance with applicable legislation, directives, and internal guidelines.
7. ESG factors should be considered in investment decisions where feasible, and any exclusions or screens shall be documented.
8. All investment decisions, changes in strategy, and performance evaluations shall be documented and retained for audit and governance purposes.