



**SMART.  
NOT SLICK.**



**VERECAN**  
CAPITAL MANAGEMENT INC.



## WHAT IS VERECAN CAPITAL MANAGEMENT INC.?

Many years ago, our founding partners set out together to find better ways to do the right thing for their clients. Verecan is an evolution of that vision.

Working with a portfolio manager is kind of like having a financial Sherpa by your side, guiding you through the anxiety-inducing valleys and exhilarating peaks of the investment landscape.

Having a skilled, knowledgeable and (this part is important) experienced Portfolio Manager at your side can provide a safeguard between you and some very bad decisions. That goes for getting panicky when things aren't going great *and* getting too cocky when they are. We plan for the ups, the downs, and we expect the unexpected.

We also have the decades of experience needed to make smart choices when the unexpected happens.

We don't spend a lot of time talking about how great our funds have performed or how good we are at building portfolios. That's because although great advice and access to good products and solutions is really important, the best way to ensure long-term performance is to invest in a way that strategically balances performance against risk, with a goal of never blowing up your money.

Providing really good investment advice is, **and we mean this literally**, the absolute least we could do.

You can trust us to do everything in our power to get you to your goal, in fact, we've worked hard to make sure our goals are as aligned with yours as possible.



# Great. Got it.

## But...what are your qualifications?

To qualify as a Portfolio Manager, the securities regulator has set strict requirements. In addition to some very intense courses, a prospective Portfolio Manager must also prove extensive and specific industry experience before being approved for the designation.

Not to brag, but, the designation is difficult to achieve.

Portfolio Managers manage investments for clients, and are held to the highest standards of any professional certification in our industry. You don't know us yet, so you can be forgiven for not just trusting us, right out of the gate. We're prepared to earn your trust, that's not a problem. We'll get there. But while we do that you should know that we have a legal obligation to act in the best interest of our clients. It's a big deal to us personally, ethically, reputationally and, (this might help assuage your nerves about getting to know us) stay-out-of-jailishly.

We already mentioned being aligned with our clients' goals. What that looks like is that **no one on our team is compensated by any kind of sales targets, we don't receive commission for the investments we recommend and we invest in the same portfolios as our clients.** We're all climbing together, heading for the same peak.

## We'll do the heavy lifting.

We match your risk profile with the appropriate investments and, if desired, we can offer solutions that consider ethical investing criteria.

We will carefully monitor your investments and maintain diversity in your portfolio, making required changes in a timely and efficient way, to reduce risk. The team meets formally on a weekly basis to review portfolios, but we are always exploring ideas and options. We believe in active management to reduce portfolio volatility.

That's industry-speak to say **we're confident in our investment process and that we promise to tailor our solutions to you, your goals, and your approach to money.**



# So you're not owned by some other large financial institution?

We're not. Thank goodness.

Very few financial services firms in Canada reach the size and scale required to become fully independent. We have. We are founder-led and employee owned. No venture capital or outside investors are involved in our firm. Everyone who has an ownership stake in this business, works in this business.

This independence and client-focused approach allows us to always make choices for our clients that are free from the influence of some overarching entity or their shareholders. We aren't forced to choose any specific product or solution.

**The bottom line is that we're always able to do the thing we believe is right for you.**

## Your peace of mind is important to us.

Verecan Capital Management Inc. client assets are held in custody with Fidelity Clearing Canada ULC (FCC), a full-service carrying broker that provides execution, clearing, custody and back-office support to Canadian brokerages and portfolio management firms.

**Even if our entire team gets stranded on a the side of a mountain, your assets are safe.**

Headquartered in Toronto, FCC has over \$69 billion in assets under administration as of Jan 2023. Their U.S. counterpart, Fidelity Clearing and Custody Solutions®, is one of the largest brokerage platforms in America, with over \$3.2 trillion and more than 8.1 million accounts. FCC is backed by the strength of Fidelity Investments, a trusted financial services provider and pioneer in the world of investments since 1946.

FCC are members of:

- Canadian Investment Regulatory Organization (CIRO)
- Canadian Investor Protection Fund (CIPF)
- Canadian Depository for Securities (CDS)

**Questions? Just ask. We're happy to chat.**



·Verecan Capital Management Inc. is registered as a Portfolio Manager in all provinces in Canada apart from Manitoba.