Creating wealth through growth stock investing

# THE FIRM

# THE TEAM

# INVESTMENT PHILOSOPHY

# INVESTMENT APPROACH

# OUR PRODUCTS

## NEWS & INSIGHTS

Innovation at Pembroke – The GBC Global Balanced Fund

Pembroke Private Wealth Management is pleased to announce the launch of the

GBC Global Balanced Fund, the firm's most diversified strategy. This new fund supports Pembroke's belief in maintaining diversified exposure to global capital markets, pursuing alpha where it makes the most sense, and using disciplined rebalancing rather than market timing to achieve long-term investment objectives.

**READ MORE**

## Peter Morton appointed Vice Chairman of Pembroke Private Wealth Management

Pembroke Management is pleased to announce that Peter Morton has been appointed Vice Chairman of Pembroke Private Wealth Management. This title recognizes the important role that Peter has played in building the profile of the firm in Montreal and across Canada.

**READ MORE**

## Caroline Miller is elected as a new director of the GBC American Growth Fund

Marc Courtois, Chairman of the GBC American Growth Fund, is pleased to announce the election of Caroline Miller as a new director of the fund. She joins Ian Aitken, Glen Roane, Lloyd Segal and Marc Courtois who were each re-elected during the Annual Meeting which took place yesterday in Montreal.

**READ MORE**


## Pembroke Family Advantage

As we celebrate 50 years of serving the investment needs of our clients and their families, we are pleased to announce the Pembroke Family Advantage Program. The Program enables you to extend many of the Pembroke benefits that you enjoy to virtually all members of your family. Benefits include using the combined value of family holdings to determine management fees.

CONTINUED

2018 is Pembroke's 50th anniversary. Fifty years of

## 50 Years: An Opportunity to Reaffirm Our Values.


investing in entrepreneurial growth companies and serving the investment needs of our clients. More than the simple passage of time, 2018 is an opportunity to reaffirm and celebrate our values, consistent investment philosophy and what we have achieved for our clients.

READ MORE

**INTEGRITY**
**EXCELLENCE**
**HUMILITY**
**ACCOUNTABILITY**
**ALIGNMENT**

## Pembroke's Mission equals client value

Pembroke's Mission/Vision statement and guiding Values are purpose-driven and focused on client outcomes. Our Mission: To help our clients secure their financial futures. Our Vision: To be a premier investment boutique for discerning investors. In the words of Managing Partner Ian Aitken: "We exist to serve the investment needs of our clients and have been focused on doing just that for 50 years."

SEE THE ENTIRE PEMBROKE MISSION, VISION AND

**VALUES STATEMENT.**

We are the largest investors in our own mutual and pooled

## Demonstrated alignment with our clients

funds and have always emphasized the importance of ownership and the proper alignment of interests. As of December 31, 2017, the value of Pembroke funds held by employees, partners, founders and our families was well over $100 million.

**The Importance of Alignment**

## About our Business

Pembroke Private Wealth Management, established in 1988, is an independent, boutique wealth management firm and a subsidiary of Pembroke Management, established in 1968. To access information about Pembroke Management, click on the Institutional navigation at the top of this home page.

For non-institutional investors, our products are only available to residents of Canada.