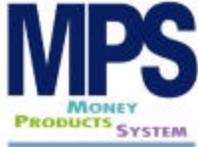




For Immediate Release  
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# PEAK INTEGRA



## Planners Move to Independence – Now Painless

**Montreal, Quebec** - PEAK Financial Group is proud to announce the implementation of its new Integra back office system. PEAK is recognized as the industry specialist for independent representatives' transitions. One of the issues during mergers and acquisitions is the difficulties for representatives to keep their independence and maintain the choice to move to another dealer easily. PEAK has created many tools to facilitate the transfer of business from one dealer to another with its new Integra system.

« It is important for planners to reduce the non-productive time during the transition from the actual dealer to the new one, » indicated Robert Frances, President and CEO of PEAK Financial Group. « We have decided to add a third platform to our operation which is linked to Integra. We now offer the choice of Winfund to the planners. PEAK is proud to support RPM Technology (RPM), CTA Systemsource (MPS), and now Winfund ».

By adding Winfund to Integra, this eliminates the need to convert data and facilitates the transition to PEAK for a new planner. PEAK also has developed new tools to allow bulk transfers respecting BSF (*Bureau des services financiers*) and MFDA (*Mutual Fund Dealers Association of Canada*) regulations and procedures.

PEAK also has an exclusive financing program to help the planner buy a block of business from the competition. « The combination of the financing program with the new Integra system allows planners in the PEAK network to increase their assets and reduces risks of losing clients in the transfer process », stated Frances. Also, the Integra system allows flexibility to representatives. For example, a planner can offer a class F or other managed product on one platform and run the mutual fund client name business

on another. PEAK's role is to offer the best technology tools to help independent planners serve their clients.

Established in 1992, the PEAK Financial Group comprises PEAK Investment Services Inc., PEAK Securities Inc., PEAK Insurance Services Inc., and PEAK Financial Services Inc. It is one of the growing, privately owned providers of personal financial services in Canada. Registered in most provinces, PEAK represents more than 350 advisors and representatives who serve over 50,000 Canadians. With assets under administration of over \$2.1 billion, PEAK continues to be the dealer of choice for independent financial planners and investments and insurance advisors.

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