

PEAK Expands to Western Canada

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MONTREAL, Quebec – PEAK Financial Group is becoming the dealer of choice for a growing number of independent financial planners and brokers in western Canada. Since the beginning of last year, PEAK has attracted financial planning offices from Winnipeg to Victoria, representing over \$250 million in assets. Companies such as Solguard Financial Ltd., Caplan Beebe & Associates, and Al Lind have all joined the PEAK team this year.

PEAK registered in October 1998 in British Columbia, October 2000 in Manitoba, and August 2001 in Alberta. “Our strategy is to methodically expand our network across the western provinces. The interest in PEAK has been growing rapidly in all three provinces” states Robert Frances, President and CEO of PEAK Financial Group. “We joined PEAK because we were looking for back office support with an eye to the unique needs of the independent representative. We were frustrated with the consolidator approach”, explains Alan Caplan of Caplan, Beebe & Associates. Caplan has been with PEAK since August 2001. Another reason that PEAK is attractive to the independent advisor is due to the technology solutions and support it provides to its representatives. “Since our association, their strength and leadership in the technology side of our business has enabled us to provide a higher level of service to our clients. It’s been a great move for us, and a great move for our clients,” states Michael Solnes of Solguard Financial Services. Solguard has been with PEAK since September 2001.

Established in 1992, PEAK Financial Group comprising PEAK Investment Services Inc., PEAK Securities Inc., PEAK Insurance Services Inc., and PEAK Financial Services, Inc. is one of the fastest growing, privately owned providers of financial services in Canada. Registered in Quebec, Ontario, Manitoba, Alberta and British Columbia, PEAK represents more than 250 planners and brokers across the country. With assets under administration of \$1.85 billion in 2001, PEAK continues to be the dealer of choice for independent financial planners, securities brokers and insurance professionals. For more information about the PEAK Financial Group, visit our web site at www.peakgroup.com.

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