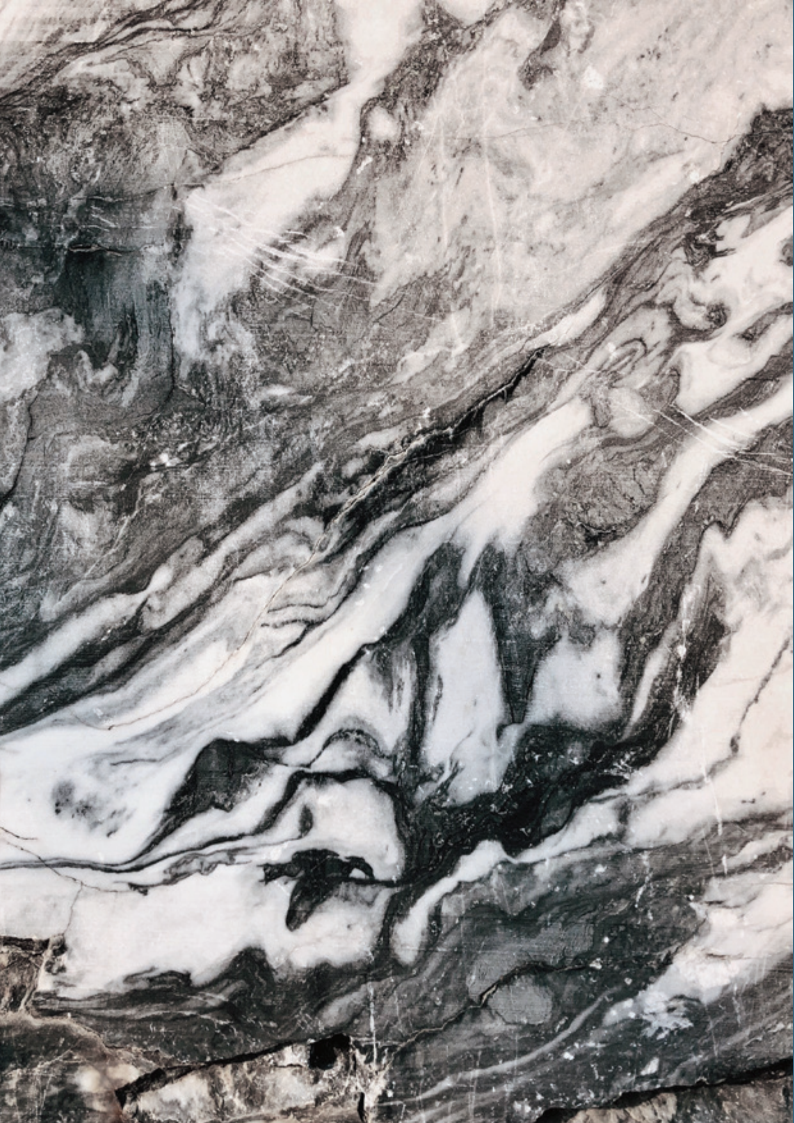

PEGASI™
PRIVATE WEALTH

ALIGNED
capital partners inc.


CREATE
YOUR
OWN
JOURNEY

Dear Investor,

At Pegasi Private Wealth of ACPI, we pride ourselves in offering excellent wealth advisory service and delivering top-notch client experience.

I would like to personally invite you to become a private client ours. By entrusting us with your investment needs, we will endeavor to reinforce that trust in our wealth management service to you and your family.

We understand the importance of building your wealth and realize your investment goals, and we are committed to helping you get there.

This booklet is your guide to many valuable services we offer to you upon becoming our private client. We look forward to partnering with you on your journey.

Sincerely,

Terry Tang

Terry Tang, MBA, CIM
Investment Advisor

Fee-Based Approach

We operate on a fee-only basis, so that our interests are aligned with yours. We specialize in wealth advisory, investment planning, retirement planning, and estate planning.

Canadian Investor Protection Fund

Eligible investments are protected up to $1 million CAD for general accounts or separate accounts. For more information, please visit www.cipf.ca for details.

Custodian

Our custodian is National Bank Independent Network, a division of National Bank Financial Inc. (NBF Inc.).

Personalized Investment Plan

We understand that every client is unique. As your investment advisor, we will identify your investment needs and construct a personalized investment plan to help you achieve your financial goals.

Access To International Markets

Tap into major international markets to diversify your investment portfolio and take advantage of investment opportunities around the globe.

Retirement & Estate Planning Advice

Planning for retirement and estate are the cornerstone of the work we do. Our process takes into account any existing or potential tax and legal implications in your investment plan to ensure your retirement or estate planning objectives can be achieved.

Investment Philosophy

Our strategy combines macroeconomic approach with bottom-up security selection utilizing the three pillars - quality, growth, and value. It is designed to produce sustainable above average return while accepting fair levels of risk.

Quality

Mid- to Large Cap companies with proven track record of disciplined and diversified business.

Growth

Sustainable competitive advantage of products and services, strong industry growth trend.

Value

Undervalued by the market or trading for less than their intrinsic or book value.

Equities are primarily invested in medium to large capitalization companies in North America, Western Europe, Asia Pacific and Emerging Markets. Fixed-income are primarily investment grade bonds and asset-backed securities.

Bio

Terry brings you more than 20 years of experience in the financial services industry. Prior to Pegasi, he had a successful career working for a number of top financial institutions in the field of sales management and business development. He has held various management positions in Toronto, Hong Kong, Beijing, and Kuala Lumpur.

Terry specializes in international investing and offers gold standard for client experience and service performance. Over the years, Terry has helped many of his clients achieve their financial goals.

Terry is a Chartered Investment Manager (CIM) and holds an MBA degree from University of Iowa - Tippie School of Business.

Investment Strategy

Our process requires a thorough understanding of your investment objectives, financial circumstances, and risk appetite. We then construct an investment strategy that is tailored for you.

INCOME

To seek long-term capital preservation and regular interest income, with minimal volatility.

PRUDENT

To seek modest capital appreciation and regular interest income, with modest volatility.

BALANCED

Regular interest income and dividends, long-term capital appreciation, and average volatility.

GROWTH

Long-term capital appreciation, modest interest income and dividends, with above average volatility.

OPPORTUNISTIC

To seek substantial long-term capital appreciation with high volatility.

Risk/Return Profile

The level of risk for the strategies listed below are in ascending order. Each strategy consists of different asset mix, and the higher the potential rates of return, the higher the degree of risk involved.

Profile	Cash	Income	Equity
Income	5%	95%	-
Prudent	5%	70%	25%
Balanced	5%	45%	50%
Growth	5%	15%	80%
Opportunistic	5%	-	95%

Note: The asset mix for each strategy above is for reference only and the actual asset mix may differ.

Eligible Investment Accounts

Eligible accounts include RRSP, LIRA, RRIF, RESP, TFSA, and Non-Registered Account, with an aggregate minimum investment of $100,000 CAD.

Contact Information

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Let's talk. Contact us today.


TORONTO