



Welcome to the Drake  
Financial investment  
family. We can't wait to  
watch you grow.

# Integrity and honesty are the foundation of our business.

As an exempt market dealer and mortgage brokerage, we provide services to investors and borrowers.

We provide investors with superior returns through investments normally only available to high net-worth clients.

Our investments come in varying returns and risk profiles, and our dealing representatives will ensure you get investments that are suitable for your investor profile while getting superior returns.

Many of our returns are based in real estate, such as our MIC (Mortgage Investment Corporation) offerings.

On the mortgage brokerage side, we have access to over 50 lenders including banks, credit unions, alternative lenders, and private lenders. We help our clients - whether they are individuals or businesses - to get the best rate and mortgages that they are qualified for.

At Drake Financial we manage many MICs with tracking records over 25 years. Whether you're an investor looking to diversify your portfolio, or you are looking for a mortgage for a residential or commercial property, we have a suitable product for you. Our knowledgeable staff, with over 30 years of experience in the investment and mortgage industry, are ready to assist you with the right product.

# Our leadership team



As Vice President and Managing Director, Norm holds a Bachelor of Arts with a Major in Leadership, an STI Designation and an Accredited Mortgage Professional designation and a diploma in Financial Planning, with over 20 years of supervisory and Senior Managerial experience with numerous financial institutions including Household Finance and Trust.



Peter Pasula is a Sales Professional with over 35 years experience. He has held a BCFSAs mortgage license since 2005, completed the IFSE Exempt Market Dealer course (EMP) and licensed to sell Exempt market securities. A serial entrepreneur, Peter has formed, owned and managed multiple companies and small businesses.

# Types of investments

## Guaranteed Investment Certificats (GIC)

We offer the highest rates for GIC's in Canada with banks and credit unions. GIC's are all government insured, and these investments are RSP, TFSA, RESP, RRIF eligible.

Drake is a member of the Registered Deposit Broker's Association and deals with Banks, Trust Companies and Credit Unions in Canada and all are government insured within the insured limits.

*Learn more at [drakefinancial.com/investments](http://drakefinancial.com/investments)*

## Mortgage Investment Corporation Shares (MIC)

A Mortgage Investment Corporation (MIC) is a pool of investor funds dedicated to investing in mortgages. Every MIC has its own terms and guidelines, therefore it is very important to find the right MIC that matches your investment profile and goals. It is a passive investment, meaning you don't have to manage it on a daily basis. Dedicated and experienced fund managers are overseeing the portfolio on the shareholder's behalf. Every MIC has a history. Let Drake Financial assist you in assessing a MIC suitable for your goals.

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## Real Estate Investment Trusts (REIT)

Real estate investment trusts are a pool of investment funds targeted at investing in Canadian real estate providing superior returns with strong security and stable income stream.

*Learn more at [drakefinancial.com/investments](http://drakefinancial.com/investments)*

# Types of investments

## Private Mortgages (DMI)

You have the ability to invest as a private lender in the mortgage industry. Your investment will be secured by a mortgage of real property and you choose the property, terms and conditions that you wish to invest in. This type of investment is considered more high risk because you are not sharing this default with other investors. However, there is the potential for a higher return as the management fees are lower. These investments are RSP, TFSA, RESP, RRIF eligible.

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## Limited Partnerships

Limited partnerships are a unique investment vehicle, allowing investors to achieve favourable tax treatment in some cases, and higher returns in various asset classes.

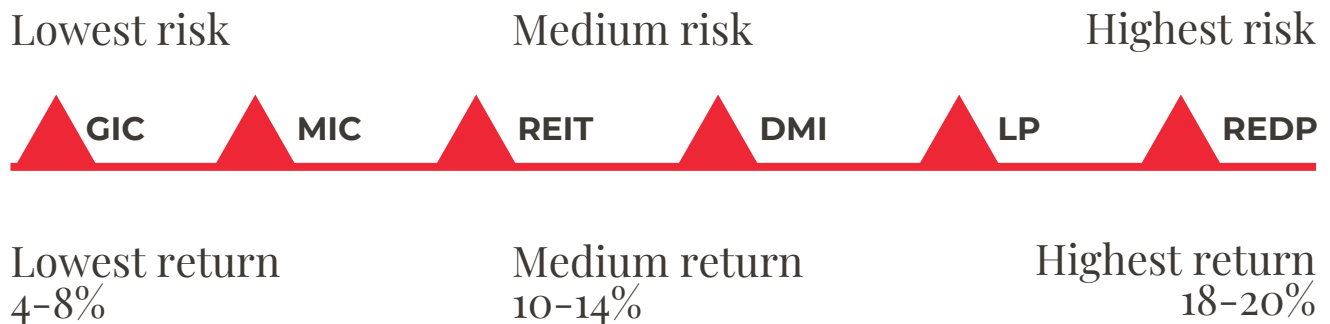
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## Real Estate Development Participation

Preferred shares and limited partnerships provide opportunities for investors to participate directly with developers and have the potential for superior returns.

*Learn more at [drakefinancial.com/investments](https://drakefinancial.com/investments)*

# Which investment type is right for you?



# Refer, and get rewarded

## **Did you know? We reward referrals.**

Simply send your friends & family to the below web page, and ensure they jot down your name on the applicable section of the form.

*[drakefinancial.com/contact](http://drakefinancial.com/contact)*

If they end up investing with us, you'll receive a \$50 Starbucks gift card.

There are no limits to the number of referral rewards you can receive. Each successful referral = a \$50 gift card for you!

# Stay up to date with Drake

We send out a monthly newsletter that details the state of the market, upcoming investment opportunities, and insights from our VP, Norm Holmes.

Be sure to sign up to receive it via our website ([drakefinancial.com](http://drakefinancial.com) - see footer portion for signup link).



Questions? Feel free to reach out to us anytime.  
[info@drakefinancial.com](mailto:info@drakefinancial.com)