Harvesting the Seeds of your Financial Success

Investment Management & Long-Term Planning

My unique investment, market & client relationship experience, which spans over 20-years, yields distinct financial management for individuals, families & businesses. I've come to believe in the focus and specialization necessary to provide clients with tailored financial strategies and true personalized service.

PI FINANCIAL
experience. driven.

HARVESTING THE SEEDS OF YOUR FINANCIAL SUCCESS

Portfolio Management
Retirement Planning
Financial Strategies

1 PROTECT PRINCIPAL

2 CREATE CASHFLOW

3 GENERATE GROWTH

Cash flow has always been an important part of investing, especially to produce higher, more consistent returns and to improve long-term planning. I specialize in creating well-diversified investment portfolios that *reduce risk, create significant & tax-efficient cashflow and generate long-term growth* within a wide range of account solutions:

PPPs
(Personal Pension Plans for Business Owners)

TFSAs
(Tax-Free Savings Accounts)

JOINT & CORPORATE ACCOUNTS

RRSPs
(Registered Retirement Savings Plan)

RRIFs
(Registered Retirement Income Fund)

RESPs
(Registered Education Savings Plan)

To support the work I do, I've developed a network of financial & business professionals to help implement an overall long-term strategy for clients.

For customized solutions to your situation, connect with me to find out what I can do for you today.

David Derwin
Portfolio Manager – Equities / Commodities
Investment Advisor

T 204 982 0011 / TF 1 844 982 0011
dderwin@pifinancial.com

Suite 1520 – 360 Main Street
Winnipeg MB, Canada

investment-options.ca

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