

# NEWS RELEASE

April 25, 2023

## Capital West Advises PI Financial on Shareholder Buyout and Merger with Echelon Wealth Partners

Founded in 1982, PI Financial is one of Canada's largest independent investment dealers, with approximately 300 employees, serving clients from Toronto to Vancouver.



shareholder buyout & merger with



Echelon Wealth Partners ("Echelon") is a leading independent wealth management and capital markets firm headquartered in Toronto and serving clients across Canada.

Capital West acted as financial advisor to PI Financial's shareholder on this transaction.

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# CapitalWest

PARTNERS

EXPERIENCE

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RESULTS



Founded in 1990, **Capital West Partners** is an independent M&A advisory firm based in Vancouver, BC with a global reach through our IMAP partnership.

As mid-market specialists, we deliver focused financial advice and transaction expertise to public and private companies, as well as public sector entities, in Western Canada and beyond for a range of transaction situations including:

- Divestitures
- Mergers & Acquisitions
- Strategic Financings
- Valuation & Fairness Opinions
- Financial Advisory Assignments

Capital West has a proven track record of 30+ years completing transactions that maximize value for our clients. Since inception, we have completed deals with over \$11 billion in combined total value.

IMAP  
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