



**Portland  
Investment Counsel**<sup>®</sup>  
Buy. Hold. And Prosper.<sup>®</sup>

**“The highest value an advisor can give a client is to make them wealthy and preserve their wealth.”**

Michael Lee-Chin,  
Executive Chairman, CEO and Portfolio Manager  
of Portland Investment Counsel Inc.



## **Our Founder Michael Lee-Chin**

Michael Lee-Chin, Founder and Chairman of Portland Holdings and Executive Chairman of Portland Investment Counsel Inc. (“Portland”), an indirect subsidiary of Portland Holdings Limited; is notably one of Canada’s most successful investors.

Michael began his career as an investment advisor. As a student of wealth creation, early in his career, he studied the world’s wealth creators in an effort to find a common framework that he could apply to create wealth for his clients. By adhering to this investment framework, Michael is committed to “building strong indigenous businesses” and, equally important, these businesses should also seek to improve the social well being of the communities in which they operate.

## **MISSION STATEMENT**

To provide all wealth-seeking clients, institutions, and advisors with access to unique opportunities to co-invest with the Portland Holdings group of companies in high quality private and alternative investments typically reserved for the affluent and institutional investor.

### **A Portfolio Team that Manages Award Winning Funds\***

Over 120 years combined business and portfolio management experience. Our team have held Senior Executive positions in Canada and around the globe in various industries including: banking, wealth management, retail, infrastructure, etc. Our Portfolio Managers combine their extensive experience, in depth research and sound judgement to make decisions consistent with Portland’s investment philosophy and their client’s objectives.



# THE PORTLAND DIFFERENCE

At Portland, our purpose is to democratize opportunities for wealth creation by providing all wealth-seeking investors with access to quality award winning private and alternative opportunities typically reserved for affluent and institutional investors.



## OWNERS, OPERATORS AND INVESTORS

At Portland, we have a unique history of being Owners, Operators and Investors in excellent businesses globally. Our unique “hands on” operational experience in businesses across various sectors, allows us to thoroughly understand the businesses in which we invest. We know what makes a successful business and are adept at calculating the associated underlying risks. It is with this incisive judgement that we measure and assess potential investments.

## PORTLAND'S INVESTMENT PHILOSOPHY

At Portland, our investment philosophy is reflective of our investor role models' approach to wealth creation.

- We are long term investors taking an owner/operator perspective to security selection.
- We manage low turnover concentrated portfolios.
- We tend to favour capital light businesses with durable competitive advantages that benefit from long term growth trends.
- As active managers, we are agnostic to sector allocation or benchmark weighting.
- Geographically, we have global expertise with a focus and bias towards Canada, North America and the Caribbean.
- We emulate the pre-eminent pension plans, endowment funds and family offices in offering access to a breadth of private and alternative investment solutions.
- At Portland, as owners, operators and investors in excellent businesses globally, we practice 15 rules\* for creating wealth.



\* For further details about the awards and the 15 rules for creating wealth please see: <https://portlandic.com/PDF/ENG/presentations/PORT8008-E%20Portland%20Group%20Overview%20PPT%20-%20PIC%20Full%20Version.pdf>

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