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# Biggest investment fund management firms in B.C. in 2020

Ranked by assets as of January 2020/December 2019

Published on January 27, 2020, as part of the Top 100 money sources in B.C. section. See also [asset-based lenders](#), [banks](#), [credit unions](#), [investment banking firms](#) and [mezzanine lenders](#). Sources: Interviews with firms below and BIV research. Other firms may have ranked but did not respond to information requests by deadline. NP = Not provided

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| Rank '20 | Company   | Top local executive(s)                                 | Sectors   | Year founded | B.C. staff '20/'19 | Assets '20/'19               |
|----------|---|--|---|--------------|--------------------|------------------------------|
| 1        | Leith Wheeler Investment Counsel Ltd<br>400 Burrard St Suite 1500, Vancouver V6C 3A6<br>P: 604-683-3391 F: 604-683-0323<br>leithwheeler.com | Jim Gilliland, president and CEO, head of fixed income | Individual investors, high-net-worth families, pension plans, endowments, foundations, Indigenous communities | 1982         | 87<br>95           | \$21,000,000<br>\$18,200,000 |
| 2        | Nicola Wealth<br>1508 Broadway W Suite 500, Vancouver V6J 1W8<br>P: 604-739-6450 F:   | David Sung, president, John Nicola, chairman and CEO   | Entrepreneurs, business owners, affluent families and foundations   | 1994         | 198<br>180         | \$6,930,000<br>\$5,743,000   |

|   |  |   |   |      |          |                            |
|---|--|---|---|------|----------|----------------------------|
|   | 604-739-6451<br>nicolawealth.com   |   |   |      |          |                            |
| 3 | Cypress Capital Management<br>1055 Georgia St W<br>Suite 1700,<br>Vancouver V6E 3P3<br>P: 604-659-1850 F:<br>604-659-1899<br>cypresscap.com        | Tom Dean,<br>Dean Alexander,<br>Greg Bay,<br>managing<br>directors  | NP  | 1998 | 28<br>28 | \$3,979,000<br>\$3,400,000 |
| 4 | ACM Advisors Ltd<br>1140 Homer St Suite<br>210, Vancouver V6B<br>2X6<br>P: 604-682-4865 F:<br>604-682-3265<br>acma.ca                              | Gordon Allan,<br>co-founder and<br>co-chairman,<br>Allan Collings,<br>co-founder and<br>co-chairman,<br>Chad Mallow,<br>president and<br>CEO                  | Canadian commercial<br>real estate  | 1993 | 17<br>16 | \$3,032,000<br>\$2,723,000 |
| 5 | Genus Capital Management Inc<br>980 Howe St Suite<br>860 , Vancouver V6Z<br>0C8<br>P: 604-683-4554 F:<br>604-683-7294<br>genuscap.com              | Wayne Wachell,<br>CEO, chief<br>investment<br>officer and co-<br>founder, Leslie<br>G. Cliff, co-<br>founder and<br>chair of the<br>board, Stephen<br>Au, COO | Individuals and<br>families, foundations<br>and not-for-profit<br>organizations, First<br>Nations, financial<br>institutions, pension<br>funds and unions,<br>socially responsible<br>investors (including<br>fossil-fuel-free<br>portfolios) | 1989 | 35<br>33 | \$1,577,097<br>\$1,426,210 |
| 6 | Seymour Investment Management Ltd<br>1285 Pender St W<br>Suite 900, Vancouver<br>V6E 4B1<br>P: 604-659-1722 F:<br>877-778-3770<br>seymourinvest.ca | Carl Hoyt,<br>president   | Diversified equities<br>and fixed income  | 2010 | 11<br>11 | \$1,497,936<br>\$1,180,571 |
| 7 | Steadyhand Investment Funds Inc<br>1747 3rd Ave W,<br>Vancouver V6J 1K7<br>P: 888-888-3147 F:<br>888-888-3148                                      | Tom Bradley,<br>chair   | Serves Canadians<br>from B.C. to Ontario<br>who are looking for<br>transparency,<br>investment<br>professionalism and   | 2006 | NP<br>NP | \$900,000<br>\$788,000     |

|    |  |  |   |      |          |                        |
|----|--|--|---|------|----------|------------------------|
|    | steadyhand.com   |  | low fees to help them secure their financial future   |      |          |                        |
| 8  | Sandpiper Group<br>200 Burrard St Suite 1670, Vancouver V6C 3L6<br>P: 604-558-4885 F: NP<br>sandpipergroup.ca                              | Samir Manji, CEO, Renzo Barazzuol, president and COO, Navdeep Gill, CFO  | Real estate   | 2016 | 16<br>15 | \$530,000<br>\$421,000 |
| 9  | Balfour Pacific Capital Inc<br>1075 Georgia St W Suite 2600, Vancouver V6E 3C9<br>P: 604-806-3350 F: 604-661-4873<br>balfourpacific.com    | Mark Scott, managing partner   | U.S. real estate private equity   | 2011 | 14<br>14 | \$478,000<br>\$521,000 |
| 10 | Yellow Point Equity Partners<br>1285 Pender St W Suite 900, Vancouver V6E 4B1<br>P: 604-659-1750 F: NP<br>ypoint.ca                        | Brian Begert, managing partner, David Chapman, managing partner, David Phillips, partner, Rusty Goepel, non-executive chairman | Wide range of industries including basic manufacturing, technology, communications, energy, financial, health care and services   | 2004 | 6<br>NP  | \$350,000<br>\$350,000 |
| 11 | Vanedge Capital<br>1333 Broadway W Suite 750, Vancouver V6H 4C1<br>P: 604-569-3883 F: 604-569-3813<br>vanedgecapital.com                   | R. Todd Tessier, vice-president and CFO  | Analytic platforms and applied enterprise software; disruptive technologies with IP support; computational biology  | 2010 | NP<br>10 | \$297,000<br>\$297,000 |
| 12 | Knightsbridge Capital Group<br>1111 Hastings St W Suite 388, Vancouver V6E 2E9<br>P: 604-684-7070 F: 866-684-7726<br>knightsbridgegroup.ca | Dean Shillington, president  | Provides asset-based financing for businesses in the full spectrum of risk irrespective of sector; tangible assets, equipment and property are used to unlock working capital | 2007 | 10<br>10 | \$225,000<br>\$225,000 |

|    |   |   |   |      |        |                        |
|----|---|---|---|------|--------|------------------------|
| 13 | Vistara Capital Partners<br>601 Broadway W<br>Suite 603, Vancouver<br>V5Z4C2<br>P: 604-449-5620 F:<br>NP vistaracapital.com             | Randy Garg,<br>founder and<br>managing<br>partner | Technology  | 2015 | 8<br>4 | \$225,000<br>\$125,000 |
| 14 | CAI Capital Partners<br>510 Burrard St Suite<br>1000, Vancouver V6C<br>3A2<br>P: 604-694-2525 F:<br>NP caifunds.com                     | Tracey McVicar,<br>partner                        | All except real estate,<br>venture and mining   | 1989 | 7<br>4 | \$200,000<br>\$200,000 |
| 15 | Lycos Asset Management Inc<br>808 Nelson St Suite<br>1731, Vancouver V6Z<br>2H2<br>P: 604-288-2083 F:<br>604-288-2084<br>lycosasset.com | Constantine<br>Lycos, founder<br>and CEO          | Investment portfolios<br>for families with a<br>disciplined, value-<br>based philosophy | 2008 | 6<br>5 | \$53,000<br>\$49,000   |

(1) 2018 figure

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