



Amphora Financial Group, a provider of life insurance, trust and company management services, today announced a majority acquisition of Heward Investment Management, a client-focused portfolio management firm.

As per the terms of the acquisition, native Montrealers Charles Gagnon and Louis Galardo of Amphora will join the Heward board. The structure of Heward's management and investment management remain otherwise unchanged, and the team continues to maintain important equity participation.

The Heward team will continue its mission of providing client-focused portfolio management services with independence and a disciplined approach to investment management.

"We are very enthusiastic about our partnership with Heward," says Charles Gagnon, Chairman, Amphora Financial Group. "We consider our activities to be highly complementary and conducive to an enhanced value proposition for our clients."

"After more than 40 years of building an exceptional organization, we are excited to begin the next chapter of the Heward Investment story," adds James Heward, President, Heward. "We look forward to working with Amphora to further grow and enhance our position in the investment management community."

### **About Amphora**

Founded in 2006 and based in Barbados, Amphora is a provider of life insurance, trust, and management services to private and institutional clients. For more information, visit <https://amphorafinancialgroup.com/life/board-of-directors/>

### **About Heward Investment Management Inc.**

Heward has been providing client-focused portfolio management services since 1981. Founded by C.F.G. Heward, today James "Jamie" and Geoffrey "Geoff" Heward continue the family tradition. The firm's independence and disciplined investment management approach have made Heward a trusted partner and has provided clients with value-added performance. For more information, please visit [www.heward.com](http://www.heward.com).