



James Cole, BA, CFA

Senior Vice President and Portfolio Manager

James Cole joined Portland Investment Counsel Inc./AIC Limited in February 2000 as Senior Vice President and Portfolio Manager. James has 34 years of investment experience including 25 years as a portfolio manager responsible for Canadian and U.S. equities. Investment funds managed by James have received two national awards. In 2017, the Portland Focused Plus Fund LP received the Private Capital Markets Association of Canada Investment Fund Award. In 2007, the Canadian balanced fund lead-managed by James Cole won the Lipper Award for having the highest risk-adjusted return in its category for the three years ended in 2006.

Prior to joining Portland, James was a portfolio manager with Gluskin Sheff + Associates Inc. and prior to this was Vice President and Portfolio Manager with Beutel, Goodman & Company Ltd. James also was a securities analyst for nine years culminating in 1992 with being ranked in the Brendan Wood survey of institutional investors as the #1 communications and media analyst in Canada.

James was formerly the treasurer of CFA Society Calgary and previously served for three years as a director of CFA Society Toronto and chairman of its accounting and disclosure committee. James holds a degree in Economics from Trent University and earned his Chartered Financial Analyst (CFA) designation in 1986.

AWARDS

- Private Market Capita Market Association Investment Fund Award (2017) - Portland Focused Plus Fund LP
- Canadian Balanced Fund Category – Lipper Analytics (2007) – AIC Canadian Balanced Fund (Co-managed with Randy LeClair)