# Your Wealth, Our Passion

iA Private Wealth™

# Invested in You

The single most important ingredient of your long-term financial success is working with an Investment Advisor you can trust to develop a comprehensive wealth plan – one that's tailored to your specific goals and helps you grow and preserve your wealth.

Whether you're just beginning your financial journey or planning a legacy for generations to come, our skilled and experienced Investment Advisors can help you reach your destination with confidence and peace of mind.

# Holistic planning for every facet of your life

We believe comprehensive personal wealth planning, supported by unbiased advice, collaboration and transparency, is the key to meeting your needs and helping you achieve your goals. Here's what we have to offer:

### Investing

A proven wealth management philosophy is one that takes emotion out of the equation and relies on a disciplined, long-term approach. Your objectives, risk tolerance, return expectations and time horizon are key factors in helping your Investment Advisor design a plan that can meet your retirement and other goals.

### Retirement planning

This isn't just about contributing to your RRSP or group pension plan. It's also about how you'll live in this next stage of your life. Our Investment Advisors focus on creating a plan that helps you achieve your goals in retirement.

### Saving & borrowing

Your Investment Advisor will help you set and achieve saving goals aligned with your needs and objectives, and develop a borrowing and debt-management strategy for your unique financial circumstances.

### Tax planning

Through sound investment strategies, your Investment Advisor can help reduce the amount you pay in tax every year.

### Education planning

Whether you're looking to fund a child's education or returning to school to upgrade your credentials, your Investment Advisor can help you understand your options and maximize the value of a Registered Education Savings Plan (RESP).

### Risk management

Your Investment Advisor will take an integrated approach when assessing your needs to develop a risk management plan that addresses all aspects of your life – and all scenarios that could affect your financial well-being.

### Will & estate planning

To plan for the preservation and transfer of your assets, your Investment Advisor can help you keep an eye on the horizon by understanding your situation and wishes, including tax-efficient legacy planning.

# A process focused entirely on you

The key to achieving your financial goals is a comprehensive wealth plan that's as unique as you are. In developing your plan, our Investment Advisors are guided by a six-step process:

- **Step 1** Understanding what is truly important to you
- **Step 2** Confirming your needs and priorities
- **Step 3** Setting your short- and long-term goals
- **Step 4** Developing your personal and holistic wealth plan
- **Step 5** Implementing your plan and driving it forward
- **Step 6** Monitoring your plan's progress against goals

# A full range of financial solutions

Our Investment Advisors offer a full suite of products and services for individual investors, families and business owners.

### Planning

- Retirement planning
- Tax planning
- Trust and estate planning
- Business planning
- Succession planning

### Investments

- Mutual funds
- Equity and fixed-income securities
- Exchange-traded funds
- Alternative investments

### Credit & lending

- Investment and RRSP loans
- Securities-based lending

### Accounts

- Retirement accounts
- Education savings accounts
- Non-registered accounts
- Tax-free savings accounts

### Insurance*

- Universal, term and whole life
- Disability income protection
- Critical illness
- Long-term care
- Life and insured annuities
- Group benefit plans

*Insurance products are provided through PPI Management Inc. Only products and services offered through iA Private Wealth Inc. are covered by the Canadian Investor Protection Fund.

# Over 130 years of strength and stability

iA Private Wealth is part of iA Financial Group, one of the largest insurance and wealth management firms in Canada, with operations in the United States. Founded in 1892, iA Financial Group is an important Canadian public company and has been listed on the Toronto Stock Exchange under the ticker symbols IAG (common shares) and IAF (preferred shares).

iA Financial Group

Clients[1]
**4 million**

Employees[1]
**8,200**

Stock Growth[1]
**819%**

AUA[1]
**$221.2 billion**

iA Private Wealth™

Clients[2]
**195,000**

Advisor teams[2]
**500+**

AUA[2]
**$48+ billion**

[1]As of December 31, 2021

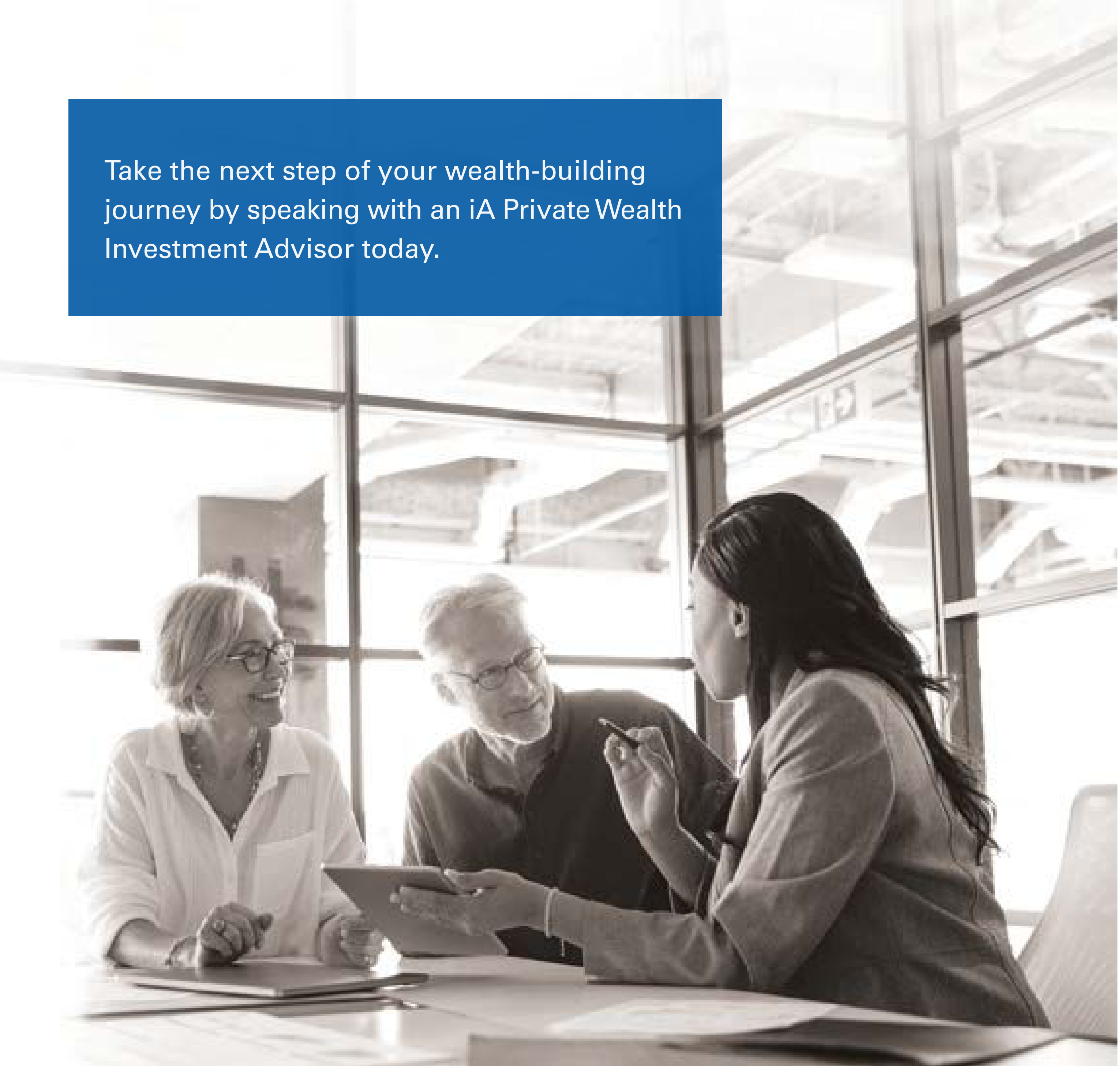
[2]As of March 1, 2022

Watch this short video to learn more about iA Financial Group.

# Listen. Understand. Advise.

Crafting a holistic, personalized wealth plan begins with understanding your unique needs and the life you envision for yourself and your family. That's why our advisors place so much emphasis on listening – to you and your family as you paint a picture of the future you're striving for.

Take the next step of your wealth-building journey by speaking with an iA Private Wealth Investment Advisor today.



iA Private Wealth offers tailored wealth management solutions through a network of more than 500 independent Investment Advisor teams. With over $48 billion in assets under administration, we are the partner of choice for discerning investors across Canada.



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