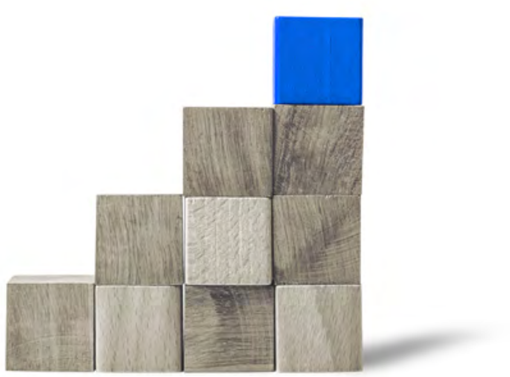
iA LARGE CASE **SOLUTIONS**

All the expertise.
All the products.
All our attention.

WHAT IS THE iA LARGE CASE SOLUTIONS PROGRAM?



The iA Large Case Solutions program offers a support service for high net worth clients who need more complex financial strategies in the areas of taxation, sales concepts and product optimization of individual insurance and savings.

Our team of experts offers customized, simple, high-performance solutions that enable advisors to meet the specific needs of affluent clients, professionals and business owners.

iA Financial Group

OUR APPROACH

- Work closely with advisors to implement strategies that protect and grow their clients' assets
- Ensure clients objectives are met by providing advisors with knowledge and expertise throughout the entire process
- Provide advisors with materials, concepts and turnkey presentations
- Offer a global professional and human experience for both advisors and their clients

OUR SPECIALTIES

- Minimizing erosion of estate assets due to taxes on capital gains
- Coping with the loss of a shareholder, senior manager or key employee
- Establishing plans in order to attract and retain employees and management
- Implementing succession strategies for companies
- Maximizing the value of the business in the event of a death, disability or retirement
- Effective planning for retirement income
- Distributing estate assets to heirs equitably
- Leaving a legacy to the community
- And more!

OUR PROCESS

STEP 1

Contact your Regional Sales Director. He is your point of entrance and your project leader for all your high value cases.

Its role and responsibilities:

- Product illustrations
- Basic concept illustration
- Questions about products
- Accompaniment throughout the process

STEP 2

For more complex cases, your Regional Sales Director will connect with a Sales Director, Large Case and National Accounts.

Its role and responsibilities:

- Specific analysis of the case
- Product illustration
- Advanced concept illustration
- Tax or legal issues
- Customized presentations for clients

STEP 3

For even more complex cases, the Sales Director, Large Case and National Accounts assigned to your case will involve the Advanced Financial and Tax Solutions team.

Its role and responsibilities:

- Advanced tax, legal or accounting analysis
- Contact and follow-up with the client's experts
- Production of tax memos or financial planning

The iA Large Case Solutions program is available to advisors and partners of all our distribution networks across Canada.

INVESTED IN YOU.