BUILDING RELATIONSHIPS.
DEVELOPING TRUST.
GROWING YOUR WEALTH.

iA Securities

INVESTED IN YOU.

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, evolves with you at every stage of life and helps you grow and preserve your wealth.

At iA Securities, our Investment Advisors are committed to doing exactly that. But creating your plan is more than just business. It's personal because as independent business owners they understand what's at stake when you invest with them. And it's why they're so invested in you and in building a relationship for the long term.

WHY WORK WITH AN iA SECURITIES ADVISOR

Like you, each of our Investment Advisors is unique, offering a range of experience, services and products to help your investments grow. All of them, however, share a commitment to flexible thinking, dedication and discipline demonstrated in these five fundamental qualities:

1. **Collaborative:** They take the time to listen and have real conversations, so they can build a meaningful and lasting relationship with you over the long term.
2. **Transparent:** Our advisors are committed to earning your confidence every day through hard work, thoughtful planning and absolute honesty and openness.
3. **Holistic:** They guide you through a disciplined process that's designed to identify your objectives, align your investment strategy with your personal situation and build a solid total wealth plan.
4. **Independent:** Our advisors have the freedom to make independent choices and can choose from a full suite of wealth solutions and services to find the options that best suit your needs.
5. **Entrepreneurial:** They own their business so your success is theirs. And you can trust that their efforts are always focused on offering you quality investments, professional analysis and sound, unbiased advice tailored to meet your goals and objectives.

"Successful relationships are built on trust, collaboration and transparency."

(JD Power 2018 Canadian Full Service Investor Satisfaction Study)

A PROCESS FOCUSED ENTIRELY ON YOU

Understanding what truly makes you unique is vital to ensuring your iA Securities advisor can help you grow and preserve your wealth for many years to come. That's why they'll take all the time necessary to meet with you and your family to discuss your goals and objectives, right now and for the long term. The information you choose to share enables your advisor to craft a comprehensive and customized profile, analyze your needs and determine the right course of action. In developing a personal wealth plan, our advisors are guided by the following process.

Our six-step wealth planning process

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

Rated among the top three firms in JD Power's Investor Satisfaction Study.

(2018 Canadian Full Service Investor Satisfaction Study)

HOLISTIC PLANNING FOR EVERY FACET OF YOUR LIFE

At iA Securities, 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. Our advisors focus on the following financial priorities to create a plan that's tailored to you:

Investing

A proven wealth management philosophy is one that takes emotion out of the equation and relies on a long-term disciplined approach, preserving investments and minimizing risk. Your objectives, attitudes toward risk, return expectations and time horizon are key factors in helping determine a plan that's right for you.

Saving and borrowing

Being fiscally responsible is the foundation for accumulating and protecting wealth. Your iA Securities advisor will work with you to ensure you're living within your means and setting attainable investment goals to build your financial independence.

Education planning

Whether you're currently at or returning to school or helping fund a child's education, your iA Securities advisor can help you consider your options and maximize the value of a Registered Education Savings Plan (RESP).

Tax planning

Your iA Securities advisor will take a straightforward approach to reducing your taxes by leveraging sound investment strategies.

Risk management

Insurance is a key component of any financial plan. That's why our advisors 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.

Planning for retirement

Planning for retirement 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 advisors focus on creating a plan that helps you achieve your goals in retirement.

Will and estate planning

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

"Helping you meet your needs and achieve your goals."

A FULL RANGE OF FINANCIAL SOLUTIONS

iA Securities advisors offer a full suite of financial products and services to individual investors and business owners.

Investments

- Mutual funds
- Equities and fixed income
- Exchange traded funds
- Alternative products

Credit and 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

Business owners

- Business planning
- Group benefit plans
- Succession planning

Services

- Retirement planning
- Tax planning
- Trust and estate planning

THE POWER OF iA FINANCIAL GROUP

iA Securities is owned by iA Financial Group, one of the largest insurance and wealth management companies in Canada today.

Canadian business
Individual insurance
Individual wealth management
Group savings and retirement
Group insurance: • Employee plans • Dealer services • Special market solutions
Damage insurance

Founded in 1892, iA Financial group is also one of Canada's largest publicly traded companies, with more than $169 billion in assets under management and administration.[1]

Stock performance

Since the initial public offering on February 3, 2000, through December 31, 2017:

IAG	660%
S&P/TSX	82%

iA Financial Group's strong 2017 performance translated into an 8% increase in book value per share, a 13% year-over-year increase in the dividend paid to common shareholders and a 12% increase in the value of the Company's stock (iAG).

iA Financial Group

Clients	Employees	Market capitalization	AUA/AUM
+4 million	**+6,800**	**$4.7 billion**	**$169 billion**

iA Securities

Clients	Advisors	AUA
+300,000	**+700**	**$37 billion**

Learn more about iA Financial Group through this short video.

HELPING YOU ACHIEVE YOUR GOALS BEGINS WITH UNDERSTANDING THEM.

Your needs and those of your family, your business and your future are unique and that's how your wealth should be managed. We believe that by truly listening and understanding the life you envision, we're able to offer advice and guidance that will make it happen.

Our advisors are committed to working with you to build a holistic wealth plan that will not only help you achieve your investment goals but also manage and simplify all aspects of your financial well-being.

Talk to an iA Securities advisor today.

iasecurities.ca

iA Securities

INVESTED IN YOU.

[1]As at December 31, 2018.

Industrial Alliance Securities Inc. is a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada. iA Securities is a trademark and business name under which Industrial Alliance Securities Inc. operates.