Guide - Client Contribution Tool

iA Mobile and My Client Space

Choose:

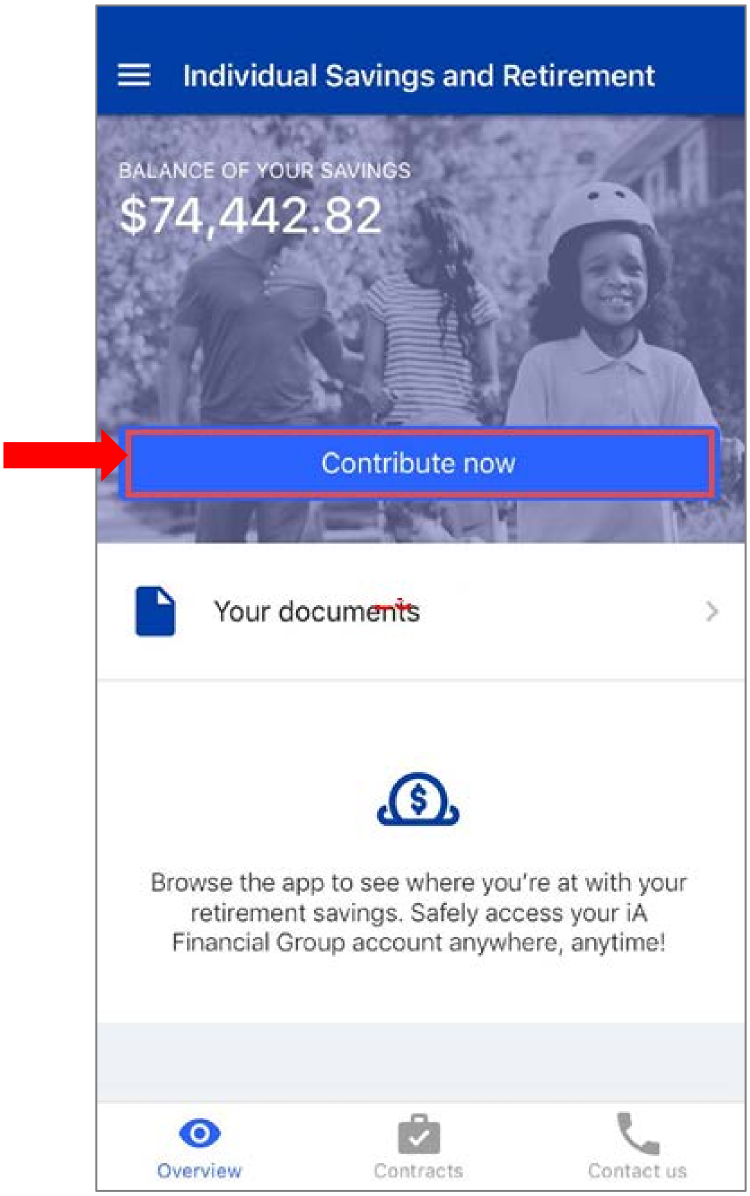
iA Mobile

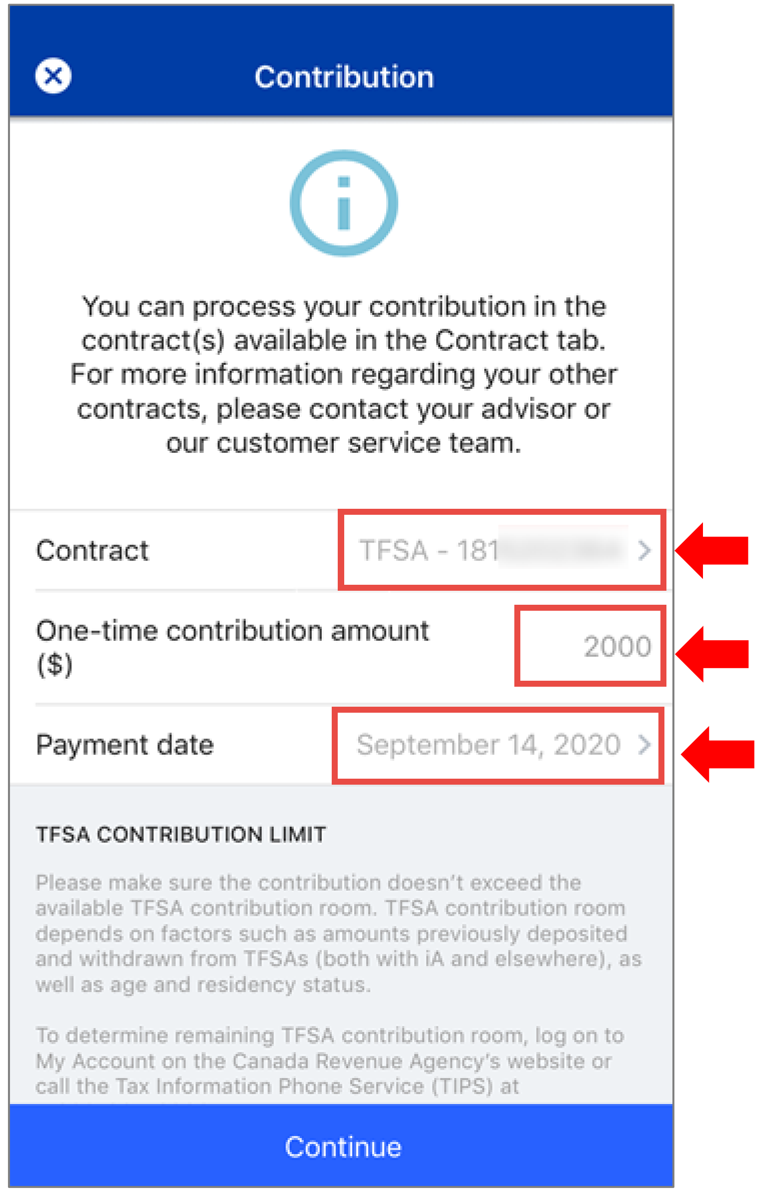
My Client Space

iA Financial Group

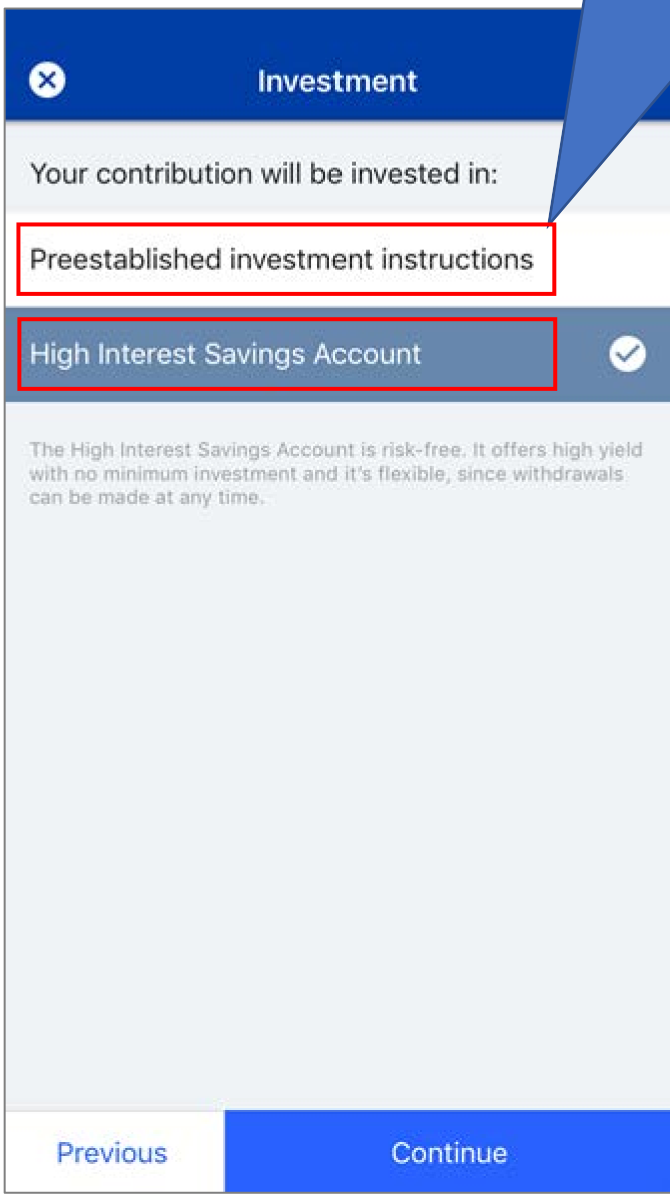
Client Contribution Tool

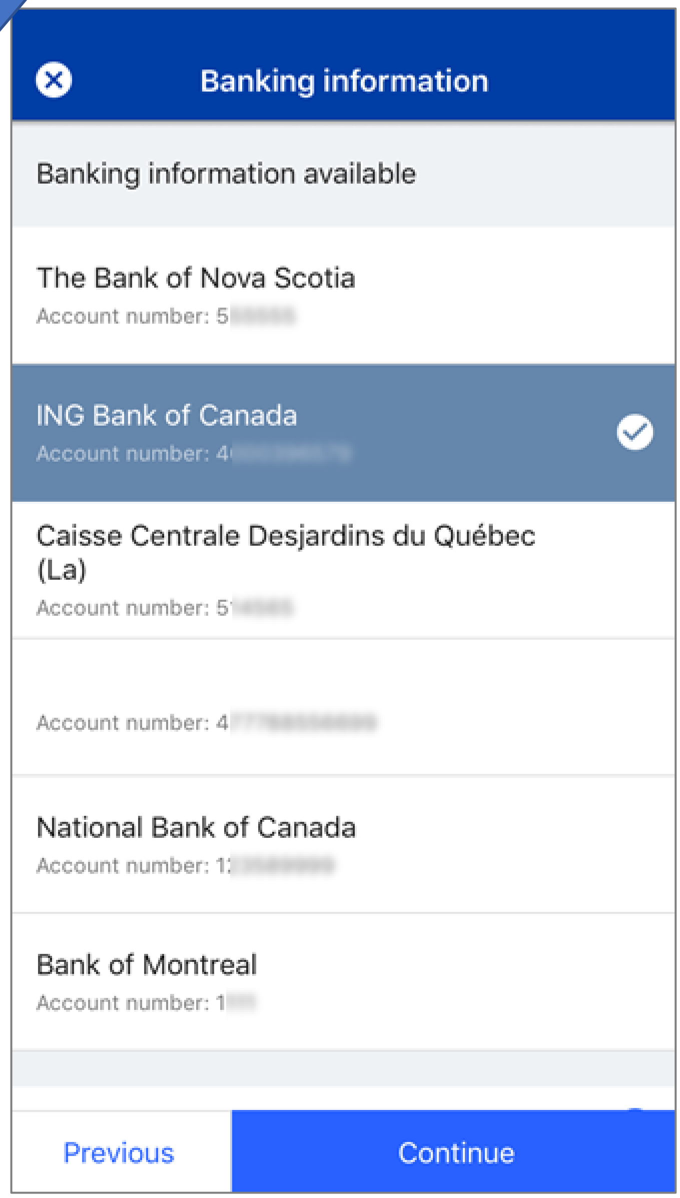
iA Mobile

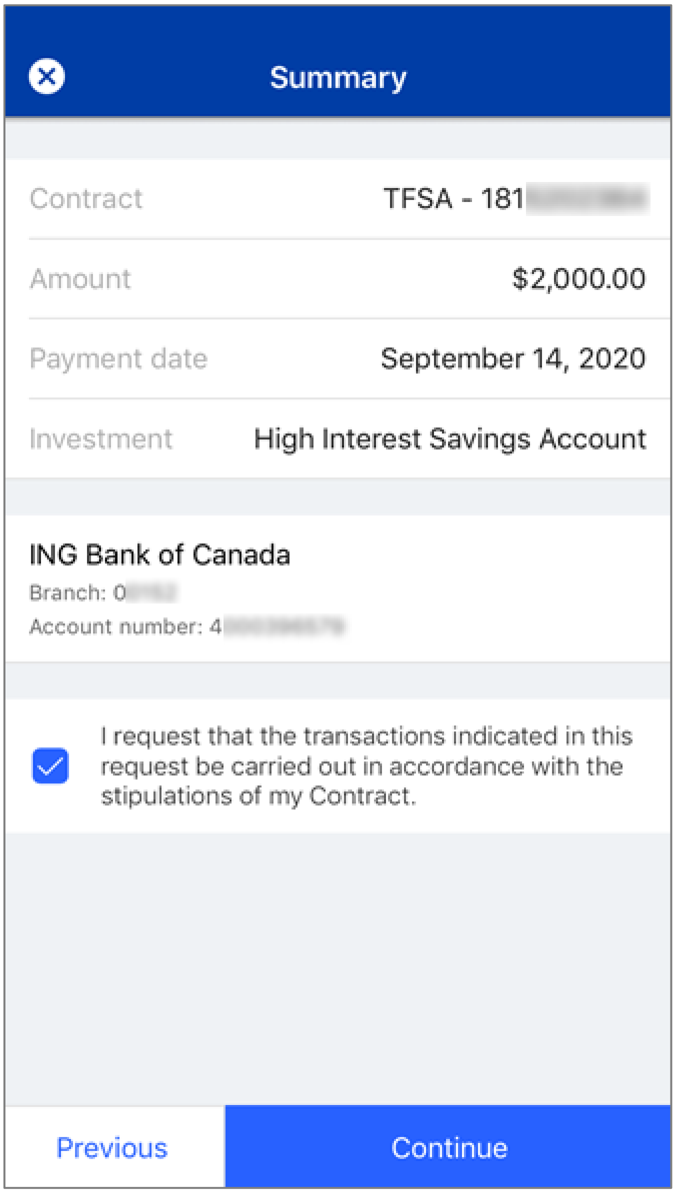


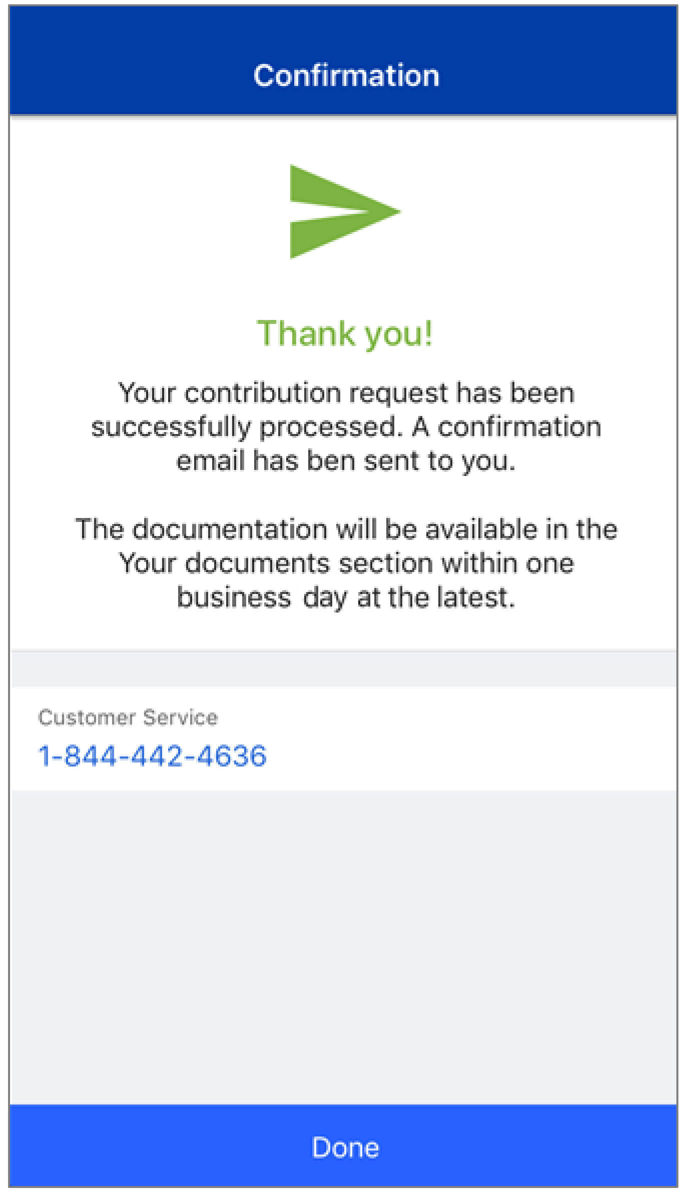


According to the client's Automatic Investment Term (AIT). The percentages cannot be modified. If no AIT on file, the "Funds currently in the contract" (pro-rata) option will appear



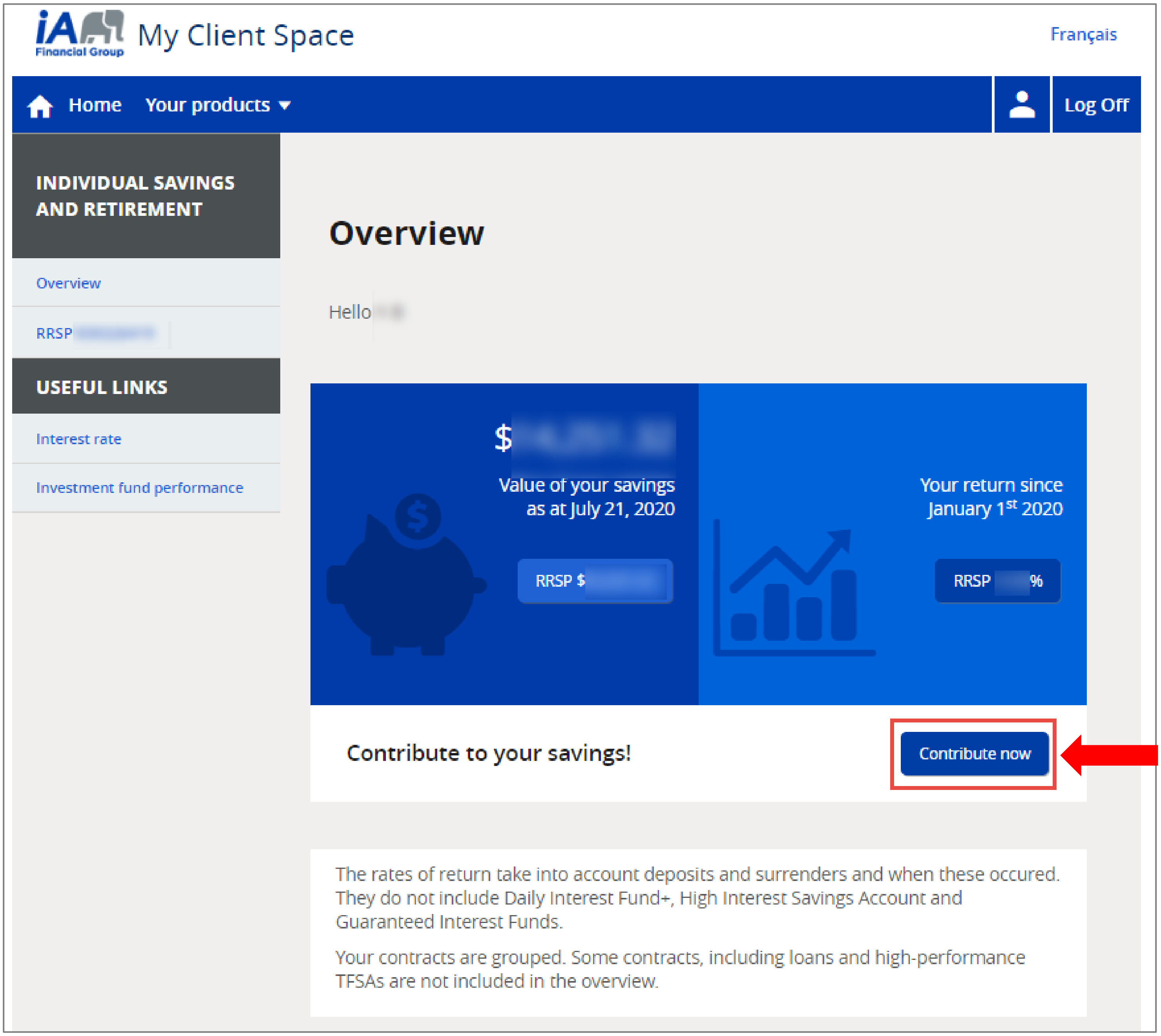


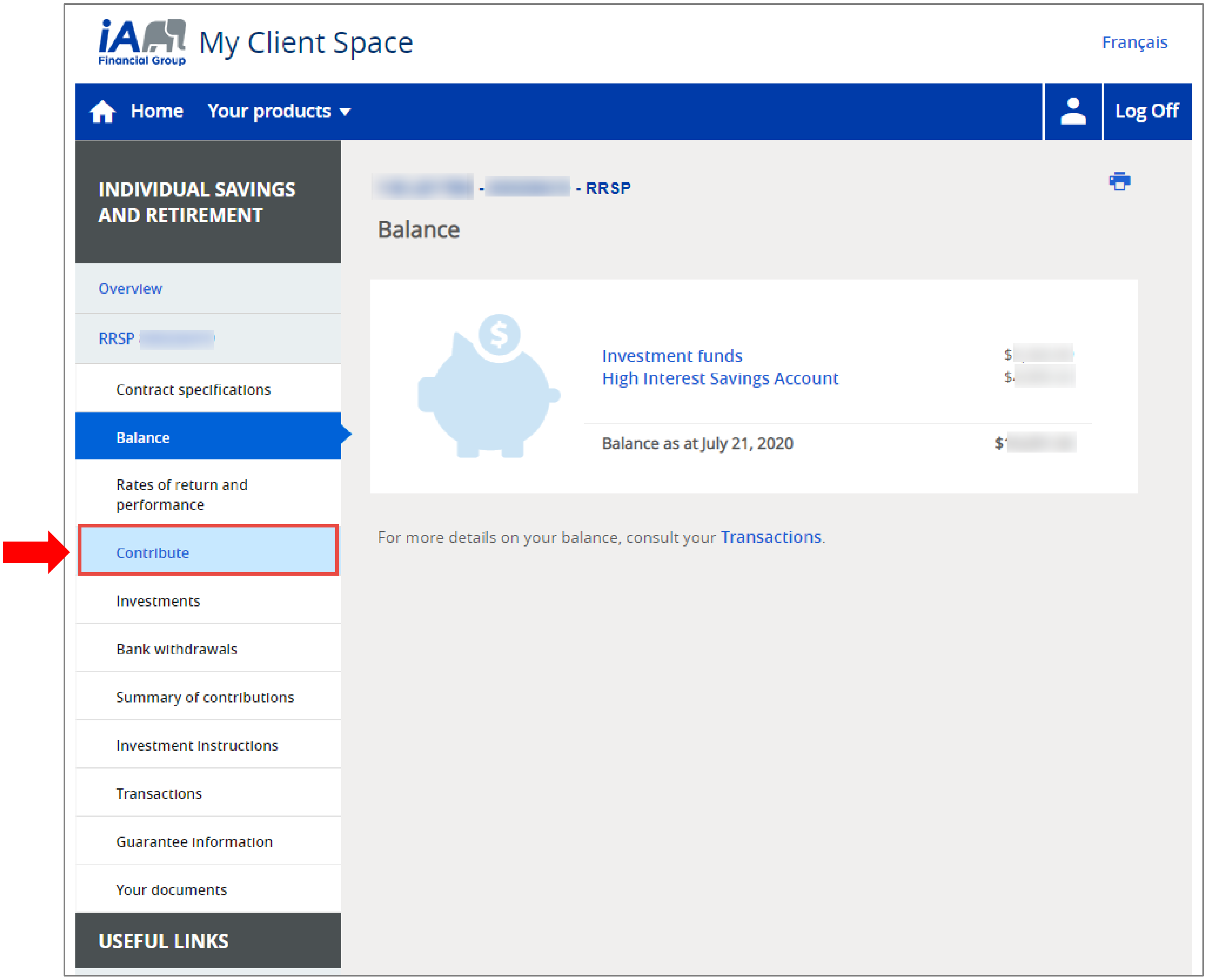

Summary
Contract
TFSA - 181
Amount
$2,000.00
Payment date
September 14, 2020
Investment
High Interest Savings Account
ING Bank of Canada
Branch: 0
Account number: 4
I request that the transactions indicated in this request be carried out in accordance with the stipulations of my Contract.
Previous
Continue


Confirmation
Thank you!
Your contribution request has been successfully processed. A confirmation email has ben sent to you.
The documentation will be available in the Your documents section within one business day at the latest.
Customer Service
1-844-442-4636
Done

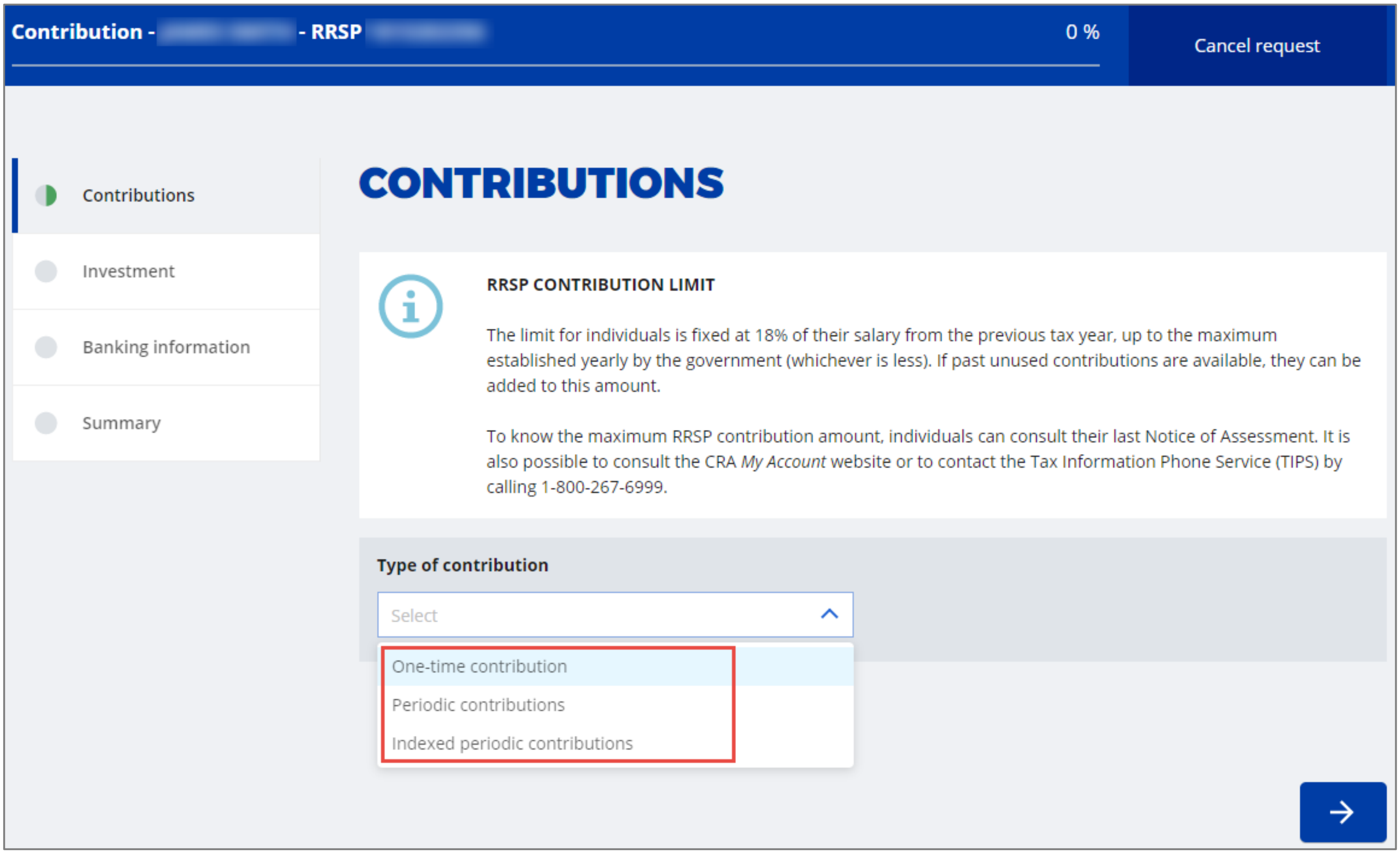
Client Contribution Tool

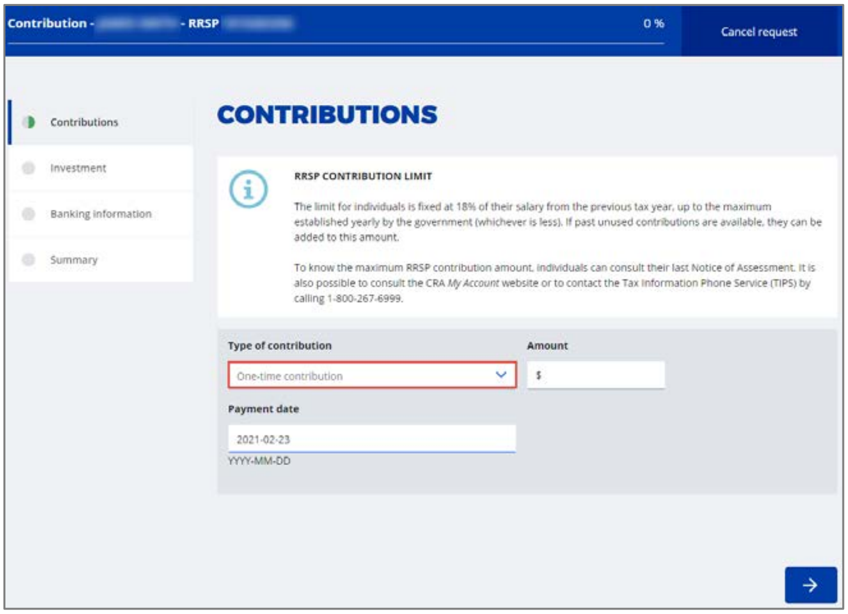
My Client Space



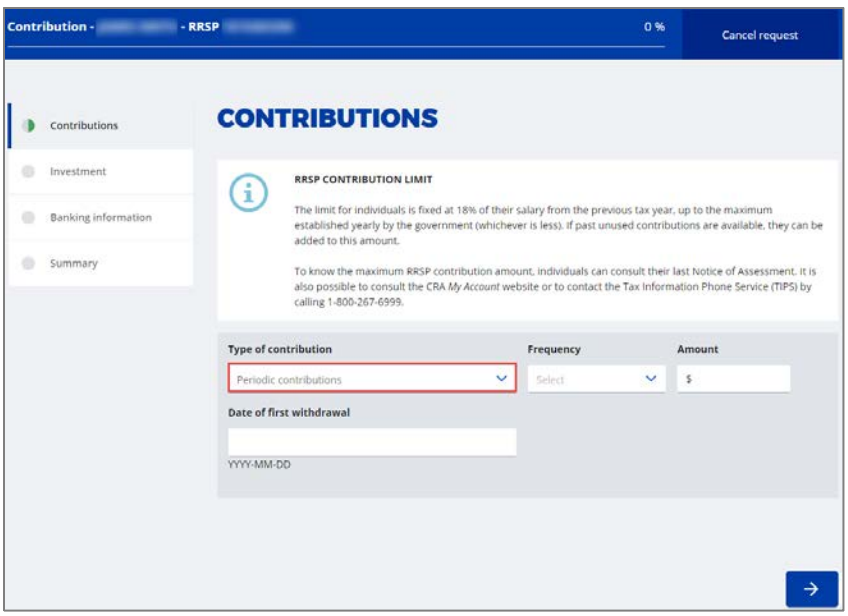

iA Financial Group
My Client Space
Français
Home
Your products
Log Off
- RRSP
Balance
INDIVIDUAL SAVINGS AND RETIREMENT
Overview
RRSP
Contract specifications
Balance
Rates of return and performance
Contribute
Investments
Bank withdrawals
Summary of contributions
Investment instructions
Transactions
Guarantee information
Your documents
USEFUL LINKS
Investment funds
High Interest Savings Account
Balance as at July 21, 2020
For more details on your balance, consult your Transactions.

Three types of contributions

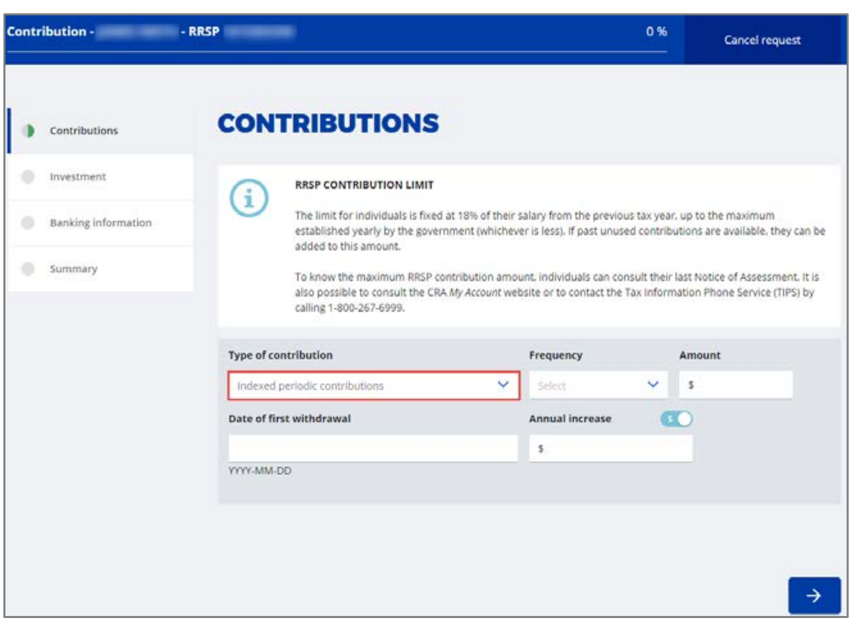




One-time contribution
([go to screens](#))

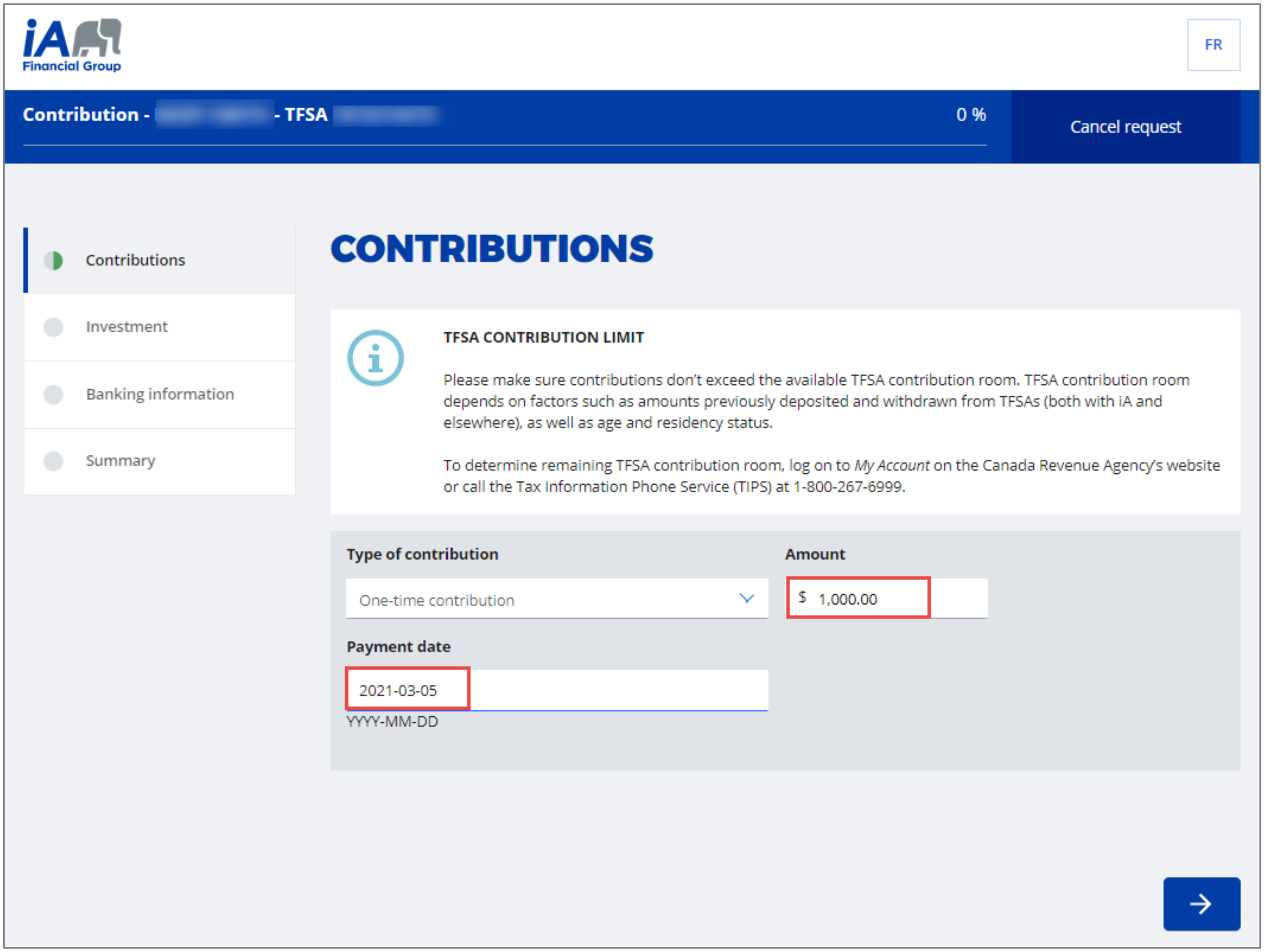


Periodic contributions
([go to screens](#))

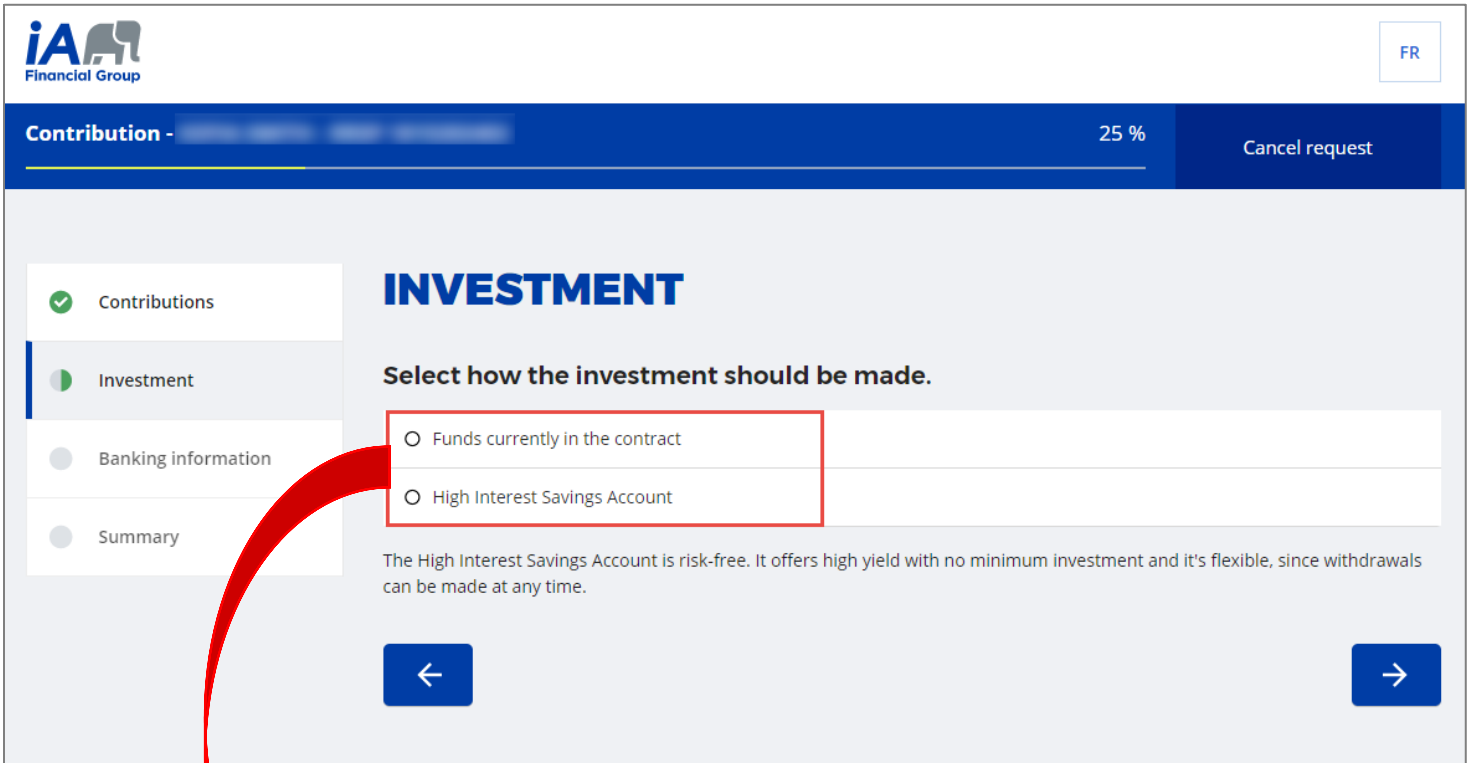


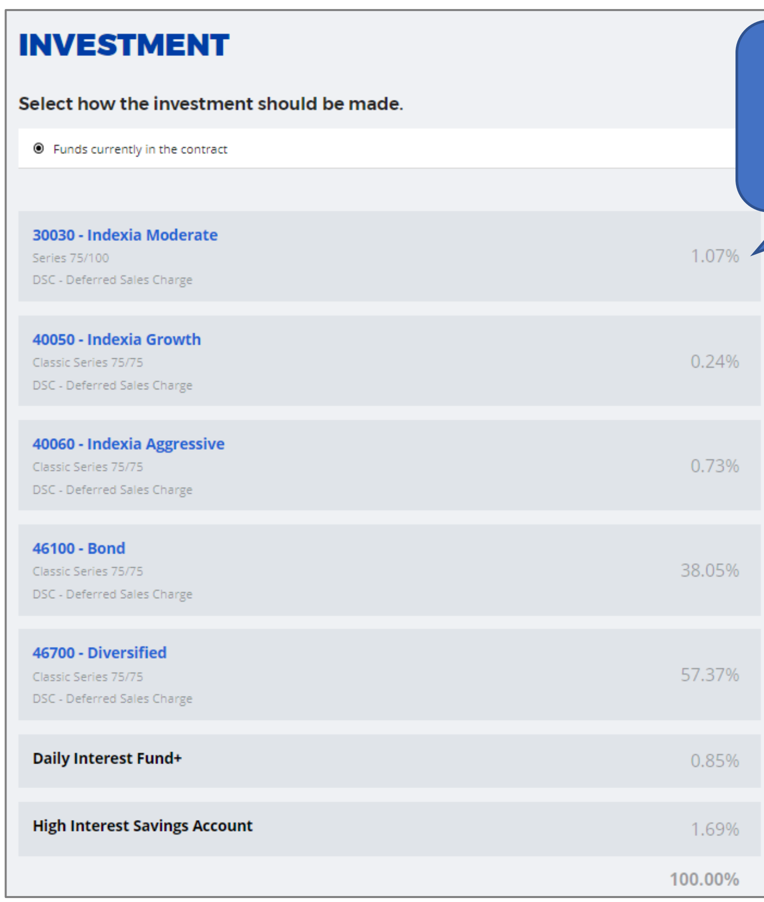
Indexed periodic contributions
([go to screens](#))

One-time contribution



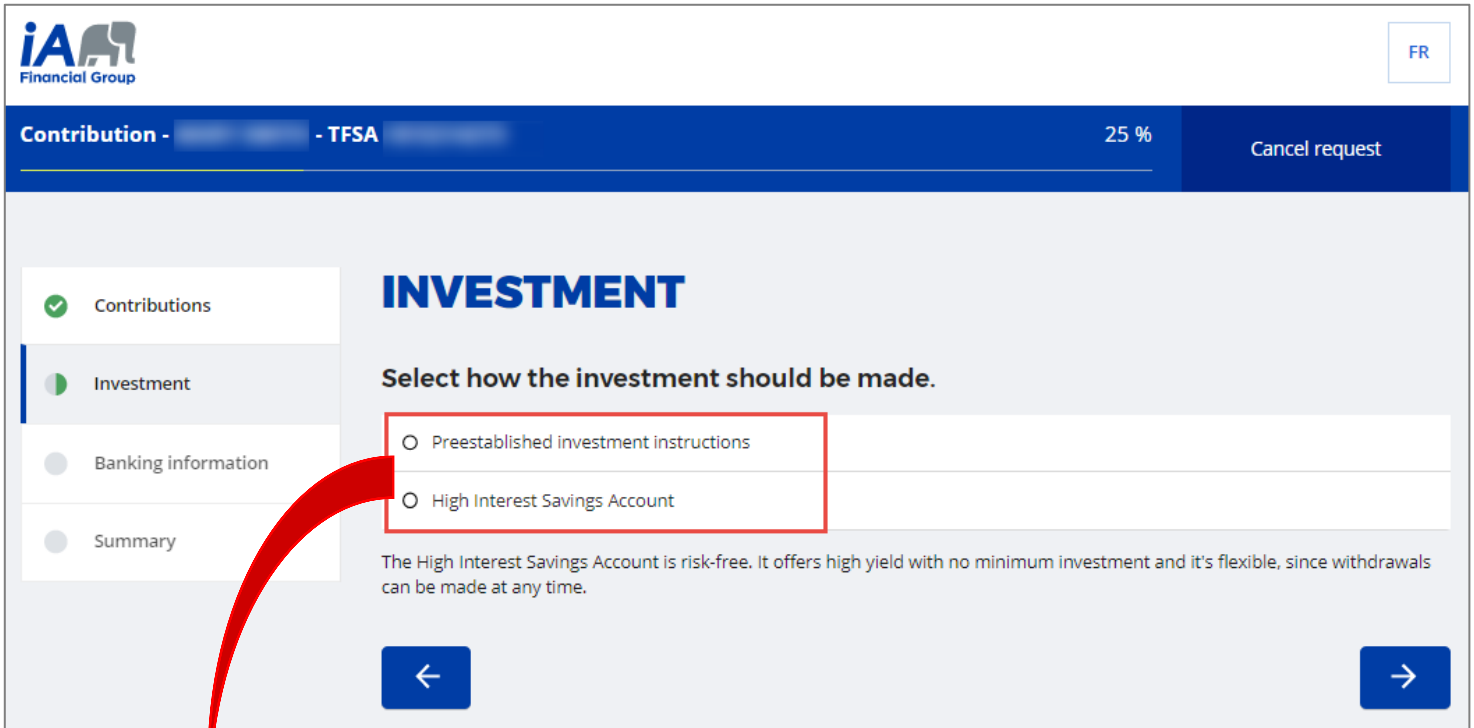
Client **without** an Automatic Investment Term (AIT) on file

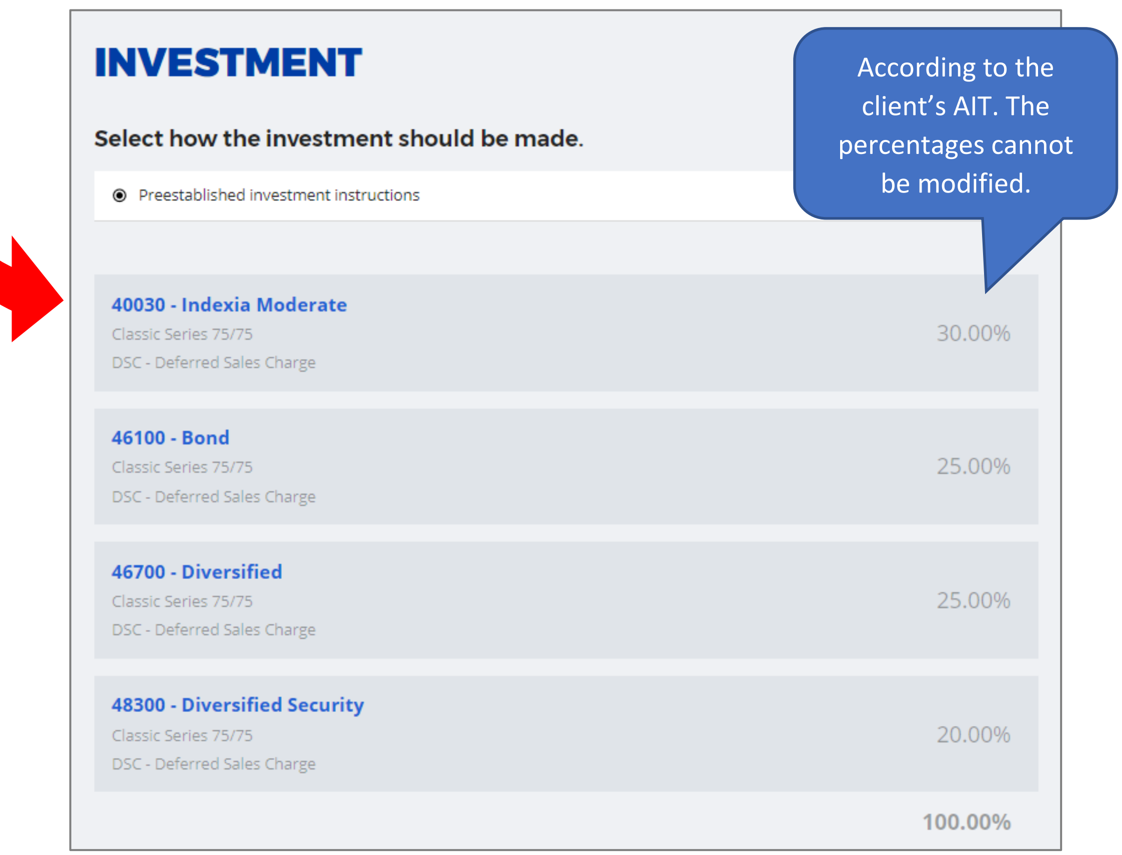




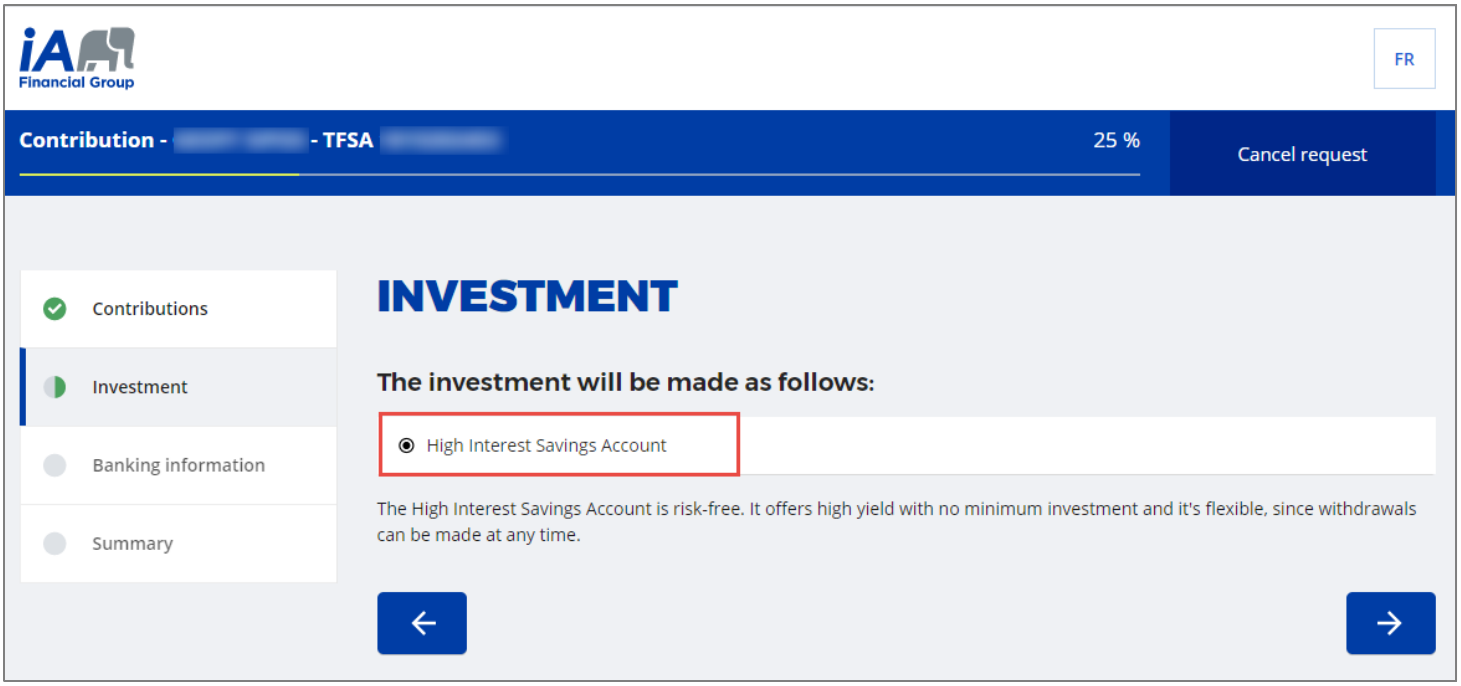
Pro-rata in existing funds. The percentages cannot be modified.

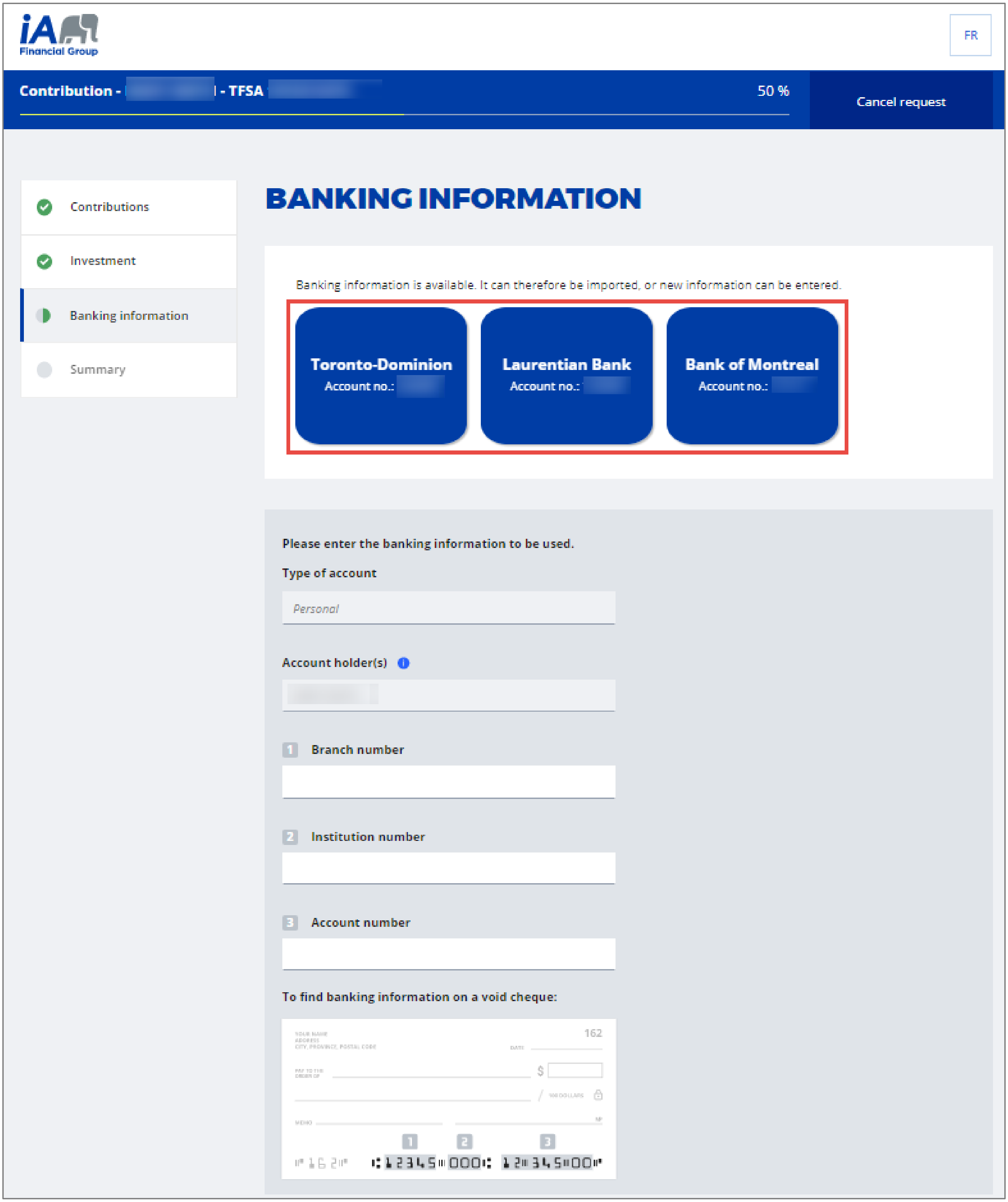
Client **with** an Automatic Investment Term (AIT) on file





Client **without** an Automatic Invest Term (AIT) on file, invested in capped funds and/or Guaranteed Interest Funds




iA Financial Group
FR
Contribution - - TFSA
50 %
Cancel request
Contributions
Investment
Banking information
Summary
BANKING INFORMATION
Banking information is available. It can therefore be imported, or new information can be entered.
Toronto-Dominion
Account no.:
Laurentian Bank
Account no.:
Bank of Montreal
Account no.:
Please enter the banking information to be used.
Type of account
Personal
Account holder(s)
1 Branch number
2 Institution number
3 Account number
To find banking information on a void cheque:
162
1
2
3

- Contributions
- Investment
- Banking information
- Summary

SUMMARY

Contract

Type of registration **TFSA - Tax-Free Savings Account**	
Contract number	Product **IAG Savings and Retirement Plan**

One-time contribution

Edit

Amount **$1,000.00**	Payment date **March 5, 2021**

Allocation of the one-time contribution

Edit

Indexia Moderate 40030	Classic Series 75/75 DSC	30.00%
Bond 46100	Classic Series 75/75 DSC	25.00%
Diversified 46700	Classic Series 75/75 DSC	25.00%
Diversified Security 48300	Classic Series 75/75 DSC	20.00%

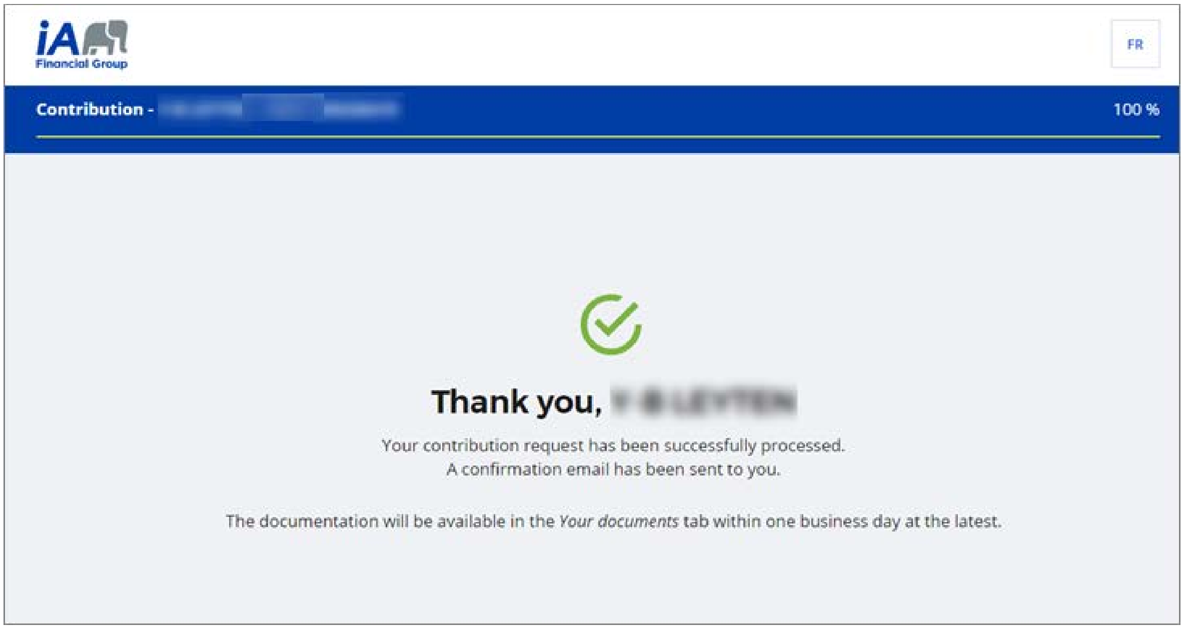
Banking information

Edit

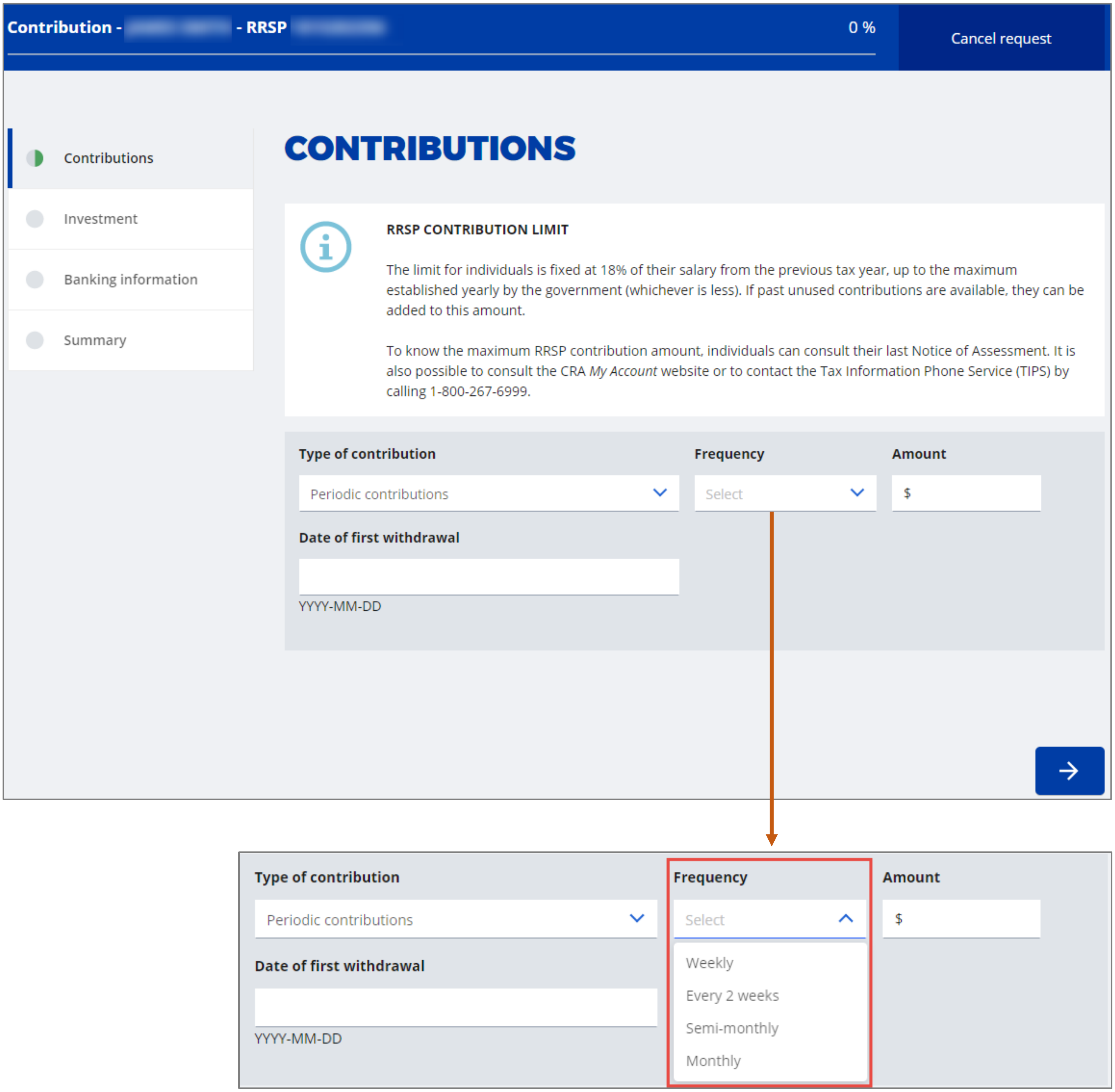
Type of account **Personal**	Account holder(s)
Branch number ☐ Verify	Institution number ☐ Verify
Account number ☐ Verify	Institution name **National Bank of Canada**

Signature

☐ I request that the transactions indicated in this request be carried out in accordance with the stipulations of my Contract.

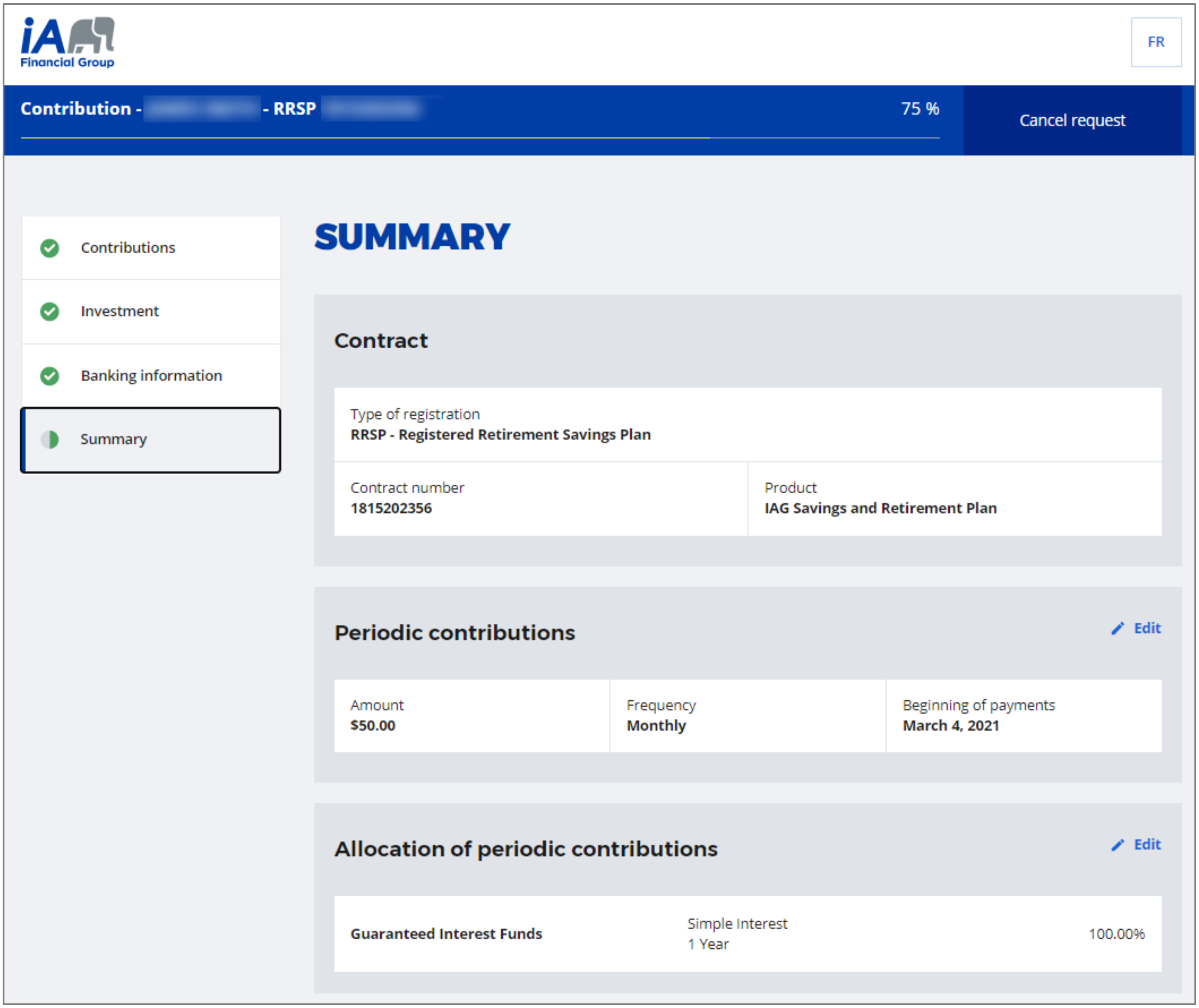

iA Financial Group
FR
Contribution -
100 %
Thank you,
Your contribution request has been successfully processed.
A confirmation email has been sent to you.
The documentation will be available in the Your documents tab within one business day at the latest.

Periodic contributions

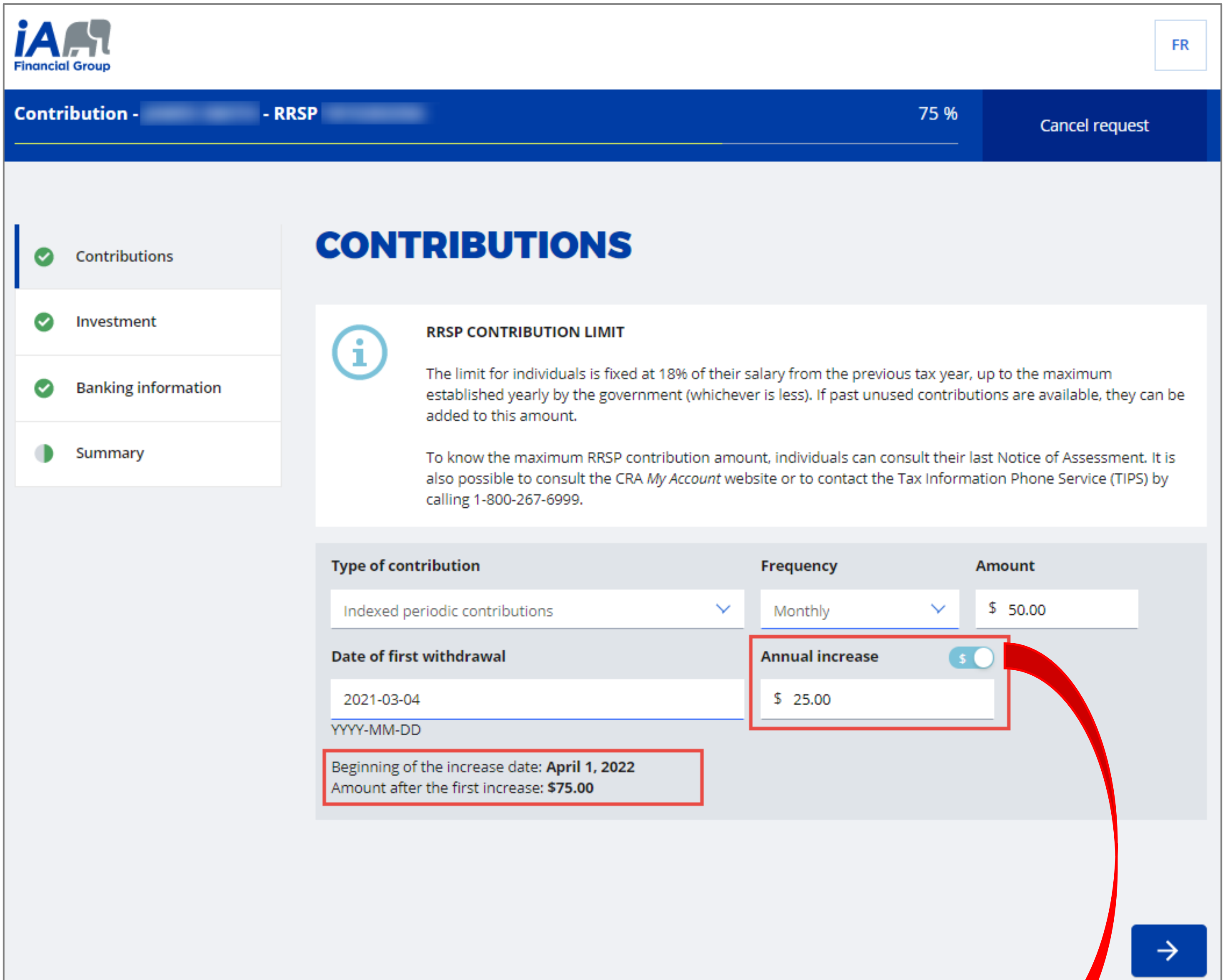


The steps in the ***Investment*** and ***Banking information*** process for <u>periodic contributions</u> are the same as for the one-time contribution.

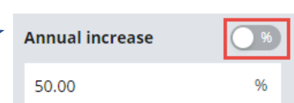
Summary
Periodic contributions



Indexed Periodic Contributions



The annual increase can also be entered as a percentage of the periodic contributions.



The steps in the ***Investment*** and ***Banking information*** process for Indexed periodic contributions are the same as for the one-time contribution.

Summary
Indexed Periodic Contributions