

Guide - Client Contribution Tool

iA Mobile and My Client Space

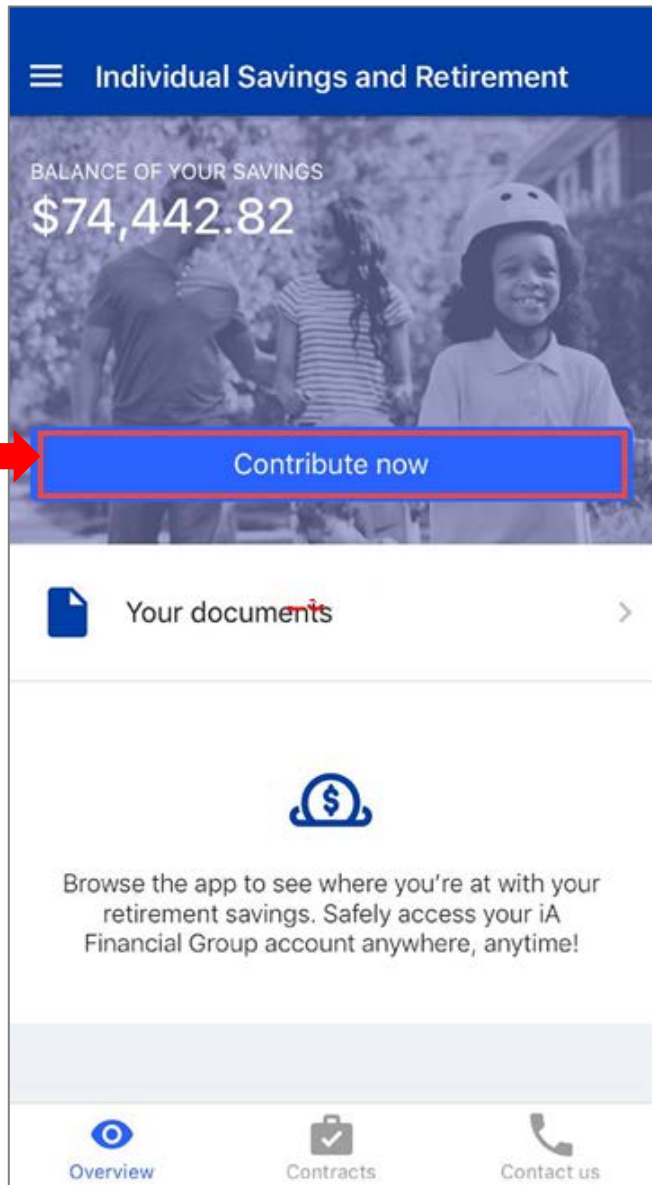
Choose:

iA Mobile

**My Client
Space**

Client Contribution Tool

iA Mobile



Contribution

You can process your contribution in the contract(s) available in the Contract tab. For more information regarding your other contracts, please contact your advisor or our customer service team.

Contract TFSA - 181

One-time contribution amount (\$) 2000

Payment date September 14, 2020

TFSA CONTRIBUTION LIMIT

Please make sure the contribution doesn't exceed the available TFSA contribution room. TFSA contribution room depends on factors such as amounts previously deposited and withdrawn from TFSAs (both with iA and elsewhere), as well as age and residency status.

To determine remaining TFSA contribution room, log on to My Account on the Canada Revenue Agency's website or call the Tax Information Phone Service (TIPS) at

Continue

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

×

Investment

Your contribution will be invested in:

Preestablished investment instructions

High Interest Savings Account

✓

The High Interest Savings Account is risk-free. It offers high yield with no minimum investment and it's flexible, since withdrawals can be made at any time.

Previous

Continue

×

Banking information

Banking information available

The Bank of Nova Scotia

Account number: 5

ING Bank of Canada

Account number: 4

✓

Caisse Centrale Desjardins du Québec (La)

Account number: 5

Account number: 4

National Bank of Canada

Account number: 1

Bank of Montreal

Account number: 1

Previous

Continue

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

 My Client Space

Français

[Home](#) [Your products ▾](#)

 [Log Off](#)

INDIVIDUAL SAVINGS AND RETIREMENT

[Overview](#)

[RRSP](#)

USEFUL LINKS

[Interest rate](#)

[Investment fund performance](#)

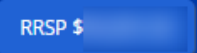
Overview

Hello 



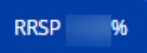
\$ 

Value of your savings
as at July 21, 2020

RRSP \$ 



Your return since
January 1st 2020

RRSP % 

Contribute to your savings!

[Contribute now](#)

The rates of return take into account deposits and surrenders and when these occurred. They do not include Daily Interest Fund+, High Interest Savings Account and Guaranteed Interest Funds.

Your contracts are grouped. Some contracts, including loans and high-performance TFSAs are not included in the overview.



Home

Your products ▾



Log Off

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

 -  - RRSP 

Balance

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

Contribution - - RRSP 0 %

Cancel request

Contributions

Investment

Banking information

Summary

CONTRIBUTIONS



RRSP CONTRIBUTION LIMIT

The limit for individuals is fixed at 18% of their salary from the previous tax year, up to the maximum established yearly by the government (whichever is less). If past unused contributions are available, they can be added to this amount.

To know the maximum RRSP contribution amount, individuals can consult their last Notice of Assessment. It is also possible to consult the CRA *My Account* website or to contact the Tax Information Phone Service (TIPS) by calling 1-800-267-6999.

Type of contribution

Select

One-time contribution

Periodic contributions

Indexed periodic contributions

→

Contribution - - RRSP
0 %
Cancel request

Contributions
Investment
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Summary

CONTRIBUTIONS

i

RRSP CONTRIBUTION LIMIT

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Type of contribution
Amount

One-time contribution
\$

Payment date

2021-02-23
YYYY-MM-DD

→

One-time contribution
(go to screens)

Contribution - - RRSP
0 %
Cancel request

Contributions
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CONTRIBUTIONS

i

RRSP CONTRIBUTION LIMIT

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Type of contribution
Frequency
Amount

Periodic contributions
Select
\$

Date of first withdrawal

YYYY-MM-DD

→

Periodic contributions
(go to screens)

Contribution - - RRSP
0 %
Cancel request

Contributions
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Summary

CONTRIBUTIONS

i

RRSP CONTRIBUTION LIMIT

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Type of contribution
Frequency
Amount

Indexed periodic contributions
Select
\$

Date of first withdrawal
Annual increase

YYYY-MM-DD
\$

→

Indexed periodic contributions
(go to screens)

One-time contribution

[FR](#)

Contribution - - TFSA

0 %

[Cancel request](#)

Contributions

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Summary

CONTRIBUTIONS



TFSA CONTRIBUTION LIMIT

Please make sure contributions don't exceed the available TFSA contribution room. TFSA contribution room depends on factors such as amounts previously deposited and withdrawn from TFSAs (both with iA and elsewhere), as well as age and residency status.

To determine remaining TFSA contribution room, log on to *My Account* on the Canada Revenue Agency's website or call the Tax Information Phone Service (TIPS) at 1-800-267-6999.

Type of contribution

One-time contribution



Amount

\$ 1,000.00

Payment date

2021-03-05

YYYY-MM-DD



Client without an Automatic Investment Term (AIT) on file



FR

Contribution - 25 %Cancel request

✓ Contributions

Investment

● Banking information

● Summary

INVESTMENT

Select how the investment should be made.

☐ Funds currently in the contract

☐ High Interest Savings Account

The High Interest Savings Account is risk-free. It offers high yield with no minimum investment and it's flexible, since withdrawals can be made at any time.

←

→

INVESTMENT

Select how the investment should be made.

☒ Funds currently in the contract

30030 - Indexia Moderate

Series 75/100

DSC - Deferred Sales Charge

1.07%

40050 - Indexia Growth

Classic Series 75/75

DSC - Deferred Sales Charge

0.24%

40060 - Indexia Aggressive

Classic Series 75/75

DSC - Deferred Sales Charge

0.73%

46100 - Bond

Classic Series 75/75

DSC - Deferred Sales Charge

38.05%

46700 - Diversified

Classic Series 75/75

DSC - Deferred Sales Charge

57.37%

Daily Interest Fund+

0.85%

High Interest Savings Account

1.69%

100.00%

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

Client with an Automatic Investment Term (AIT) on file



FR

Contribution - - TFSA 25 % Cancel request

✓ Contributions

● Investment

● Banking information

● Summary

INVESTMENT

Select how the investment should be made.

☐ Preestablished investment instructions

☐ High Interest Savings Account

The High Interest Savings Account is risk-free. It offers high yield with no minimum investment and it's flexible, since withdrawals can be made at any time.

←

→

INVESTMENT

Select how the investment should be made.

☒ Preestablished investment instructions

40030 - Indexia Moderate
Classic Series 75/75
DSC - Deferred Sales Charge

30.00%

46100 - Bond
Classic Series 75/75
DSC - Deferred Sales Charge

25.00%

46700 - Diversified
Classic Series 75/75
DSC - Deferred Sales Charge

25.00%

48300 - Diversified Security
Classic Series 75/75
DSC - Deferred Sales Charge

20.00%

100.00%

According to the client's AIT. The percentages cannot be modified.

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

FR

Contribution - - TFSA 25 %Cancel request

✓ Contributions

● Investment

● Banking information

● Summary

INVESTMENT

The investment will be made as follows:

☒ High Interest Savings Account

The High Interest Savings Account is risk-free. It offers high yield with no minimum investment and it's flexible, since withdrawals can be made at any time.

←

→

- ✓ 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:

YOUR NAME _____
ADDRESS _____
CITY, STATE, POSTAL CODE _____ DATE _____ 162

MAP TO THE
ORDER OF _____ \$ _____

/ NO DOLLARS

SEND _____

1 2 3

11 16 21 12345 000 12345 000

✓ Contributions

✓ Investment

✓ Banking information

● Summary

SUMMARY

Contract

Type of registration
TFSA - Tax-Free Savings Account

Contract number
[REDACTED]

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) [REDACTED]
Branch number [REDACTED]	Verify
Institution number [REDACTED]	Verify
Account number [REDACTED]	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.



Thank you, V-BLEVTEN

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

Contribution - - RRSP 0 %

Cancel request

Contributions

Investment

Banking information

Summary

CONTRIBUTIONS

i

RRSP CONTRIBUTION LIMIT

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Type of contribution

Periodic contributions

▼

Frequency

Select

▼

Amount

\$

Date of first withdrawal

YYYY-MM-DD

→

Type of contribution

Periodic contributions

▼

Date of first withdrawal

YYYY-MM-DD

Frequency

Select

^

Weekly

Every 2 weeks

Semi-monthly

Monthly

Amount

\$

Indexed Periodic Contributions



FR

Contribution - - RRSP 75 % Cancel request

✓ Contributions

✓ Investment

✓ Banking information

Summary

CONTRIBUTIONS

**RRSP CONTRIBUTION LIMIT**

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To know the maximum RRSP contribution amount, individuals can consult their last Notice of Assessment. It is also possible to consult the CRA *My Account* website or to contact the Tax Information Phone Service (TIPS) by calling 1-800-267-6999.

Type of contribution	Frequency	Amount
Indexed periodic contributions	Monthly	\$ 50.00

Date of first withdrawal
2021-03-04
YYYY-MM-DD

Annual increase ☒ \$ 25.00

Beginning of the increase date: **April 1, 2022**
Amount after the first increase: **\$75.00**

→

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

Annual increase ☐ %

50.00 %

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

FR

Contribution - - RRSP 75 % Cancel request

Contributions

Investment

Banking information

Summary

SUMMARY

Contract

Type of registration

RRSP - Registered Retirement Savings Plan

Contract number

Product

IAG Savings and Retirement Plan

Periodic contributions

Amount

\$50.00

Frequency

Monthly

Beginning of payments

March 4, 2021

Annual increase

\$25.00

Beginning of the increase date

April 1, 2022

Amount after the first increase

\$75.00

Allocation of periodic contributions

Guaranteed Interest Funds

Simple Interest

1 Year

100.00%

Beginning of the increase on the 1st day of the next month of the following year