Sophisticated.
Disciplined. Superior.

iA Private Wealth™

A Portfolio Manager offers a higher standard of wealth management

You have worked hard to build a successful investment portfolio, one that offers you peace of mind and financial stability. Now it is time to ensure your wealth continues to grow so you can enjoy the lifestyle you have earned.

We believe this is best achieved with discretionary wealth management, available exclusively through advisors with the Portfolio Manager designation. A Portfolio Manager is a trusted, elite professional with advanced credentials and an exemplary track record who is dedicated to providing an elevated level of client service.

Key benefits of working with a Portfolio Manager

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.

☑ Peace of mind

Rooted in an Investment Policy Statement that takes into account your specific needs, a Portfolio Manager follows regulatory standards and a strict investment discipline that offers an added advantage.

☑ Accountability

A Portfolio Manager's fiduciary responsibility means he or she acts with a higher standard of care, honesty and good faith, making investment decisions that are independent, free of bias and always in your best interests.

☑ Superior qualifications

The Portfolio Manager designation offers an enhanced measure of wealth management and requires the highest level of education and experience in the investment industry.

☑ Active management

Delegating day-to-day decisions to a Portfolio Manager allows for quick responses to unexpected market moves, better preservation of your assets in difficult markets and the ability to take advantage of unforeseen investment opportunities.

☑ Flexible options

A Portfolio Manager has access to a broad range of investment choices, including bonds, stocks, mutual funds, ETFs and alternative investments, offering you the best strategies and instruments to grow your wealth.

☑ Value pricing

Portfolio Manager fees are transparent, based on a percentage of your investments rather than on commissions from high transaction volumes, and may be tax deductible in the case of non-registered accounts.

☑ Block trading

A Portfolio Manager can execute timely trades for all clients, all at once. This ensures everyone benefits equally from market opportunities.

☑ Tax planning

Certain investment strategies offered by a Portfolio Manager provide you with potential tax advantages that can optimize your accumulation of wealth now and in retirement.

☑ Comprehensive reporting

In addition to the monthly or quarterly reports required by industry regulations, Portfolio Managers provide supplementary reports that offer consolidated views of all your accounts.

A powerful partnership to help you reach your goals

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.

INVESTED IN YOU.

iaprivatewealth.ca

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