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MY CLIENTS

Select a contract under

Search by Contract

Search by client

Last Name

First name

Date of birth

Search by company

Search by client list

- My pending requirements
- My contracts in underwriting
- My contracts to be delivered
- In-force contracts download

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Results

INDIVIDUAL SAVINGS

Obtain your clients' investment data



More info >

To run a search, please



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Obtain your clients' investment data

The following data is as at June 30, 2020.

Please select the desired information:

Select all

Reports and Lists

- Tracking my clients' investment performance as of 2020-08-26 ?
- Investment fund rate of return of all my clients - dollar-weighted ?
- Fund performance of all my clients - time-weighted ?
- RESP, RRSP and TFSA contributions for 2020
- Guaranteed interest fund maturity
- 71-year old clients
- RESP contracts of all my clients
- Expired or expiring profiles within the next 6 months (weekly)
- Fund changes effective September 4, 2020
- Fund changes effective November 20, 2020 ★ New!

Semi-annual Statements

- Investment statements of all my clients


Upload in my secured mail

Need help obtaining your clients' investment data? Call us at 1-888-610-5101

**Your request has been processed successfully**

The information will be available within a few minutes in your secured mail.

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SECURE MESSAGING

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List

Regarding Subject	Received:
 New document available - Individual Savings a... Your client's investment data	8/27/2020 2:17 PM

1 Results: message 1-1 of 1

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Message 1 of 1

subject : Your client's investment data

Received : 8/27/2020 2:17 PM


To : 

Line of business : Individual Savings and Retirement

Regarding : New document available - Individual Savings and Retirement

Expiry : 8/27/2022

Reference number : **MSG37692**

Attachment(s) :  **Clients\_chngmnt\_fonds\_20200904\_090\_B26.pdf**

Bonjour,

Further to your request of 2020-08-27 03:47:53, please find attached your clients' investment information.

The attached file Clients\_fund\_changes\_20200904\_090\_B26.pdf contains a list of all your clients who will be affected by the November 20, 2020 fund changes.

Thank you for your trust in IA Financial Group.




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IA Financial Group

FUND CHANGES EFFECTIVE November 20, 2020  
Information as at August 23, 2020

REPORT : ESR29301F  
DATE : August 27, 2020  
PAGE : 1

Please find below a list of your clients affected by these changes.

Agency Agent SU	Contract	Registration	Name	Type	Balance	Fund	Amount/pct	Frequency
		RRIF		Investment Automatic Withdrawal Term	533 191.17	27250	5.00	A

If there are no clients affected, then the message will be as follows:

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Regarding Subject	Received:
<input type="checkbox"/> New document available - Individual Savings a... Your client's investment data	8/27/2020 4:06 PM

1 Results: message 1-1 of 1

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Message 1 of 1

Subject : Your client's investment data

Received : 8/27/2020 4:06 PM

To : [REDACTED]

Line of business : Individual Savings and Retirement

Regarding : New document available - Individual Savings and Retirement

Expiry : 8/27/2022

Reference number : **MSG37702**

Hello,

Further to your request of 2020-08-27 04:06:59, please find attached your clients' investment information.

None of your clients will be impacted by the fund changes. The fund changes report was therefore not produced.

Thank you for your trust in iA Financial Group.

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