IG PRIVATE WEALTH MANAGEMENT

REGAN SCHILLER & ASSOCIATES

Say yes to life's possibilities with IG Wealth Management

When you embrace change, you embrace life's possibilities

You understand this and so do we

At IG Wealth Management, we're changing the way people see wealth

We take a holistic approach to your financial success. We do this by taking the time to understand all aspects of your financial life and family life, including your goals and concerns. With this information, your IG Consultant can ensure your plan is always adapting and synchronized to the changes in your life.

Whether you are looking to retire early, increase your real estate portfolio or start a new career—whatever your goal—your IG Consultant will work with you, offering scenarios that optimize your financial situation and help you stay open to all of life's possibilities.

Your life is dynamic and changing, so shouldn't you have a plan that changes with you?

We call it the IG Living Plan™.

The IG Living Plan: a complete picture of your financial well-being

The IG Living Plan accounts for key variables that determine your financial outcome. This includes funds in your portfolio, overall market exposure as well as factors outside of an average investment portfolio such as your savings rate, insurance, tax strategies plus retirement and estate planning.

You and your IG Consultant will meet routinely to update information relating to your financial situation, goals or concerns and create scenarios that will give you the confidence to pursue the opportunities life opens up to you.

Your well-being is determined by how effectively your plan addresses six major financial needs

We recognize that your financial needs are interconnected. That's why our process goes deeper and broader than what most people experience with other financial advisors. We take the time to explore your goals, financial aspirations and concerns for yourself and for your family. Then we follow up with a comprehensive analysis of your overall financial well-being. We call this the IG Living Plan.

MANAGING CASH FLOW EFFICIENTLY

We assess your cash and credit requirements to deliver flexibility and help optimize your taxes to help you thrive during major life events, while working toward your goals.

OPTIMIZING YOUR RETIREMENT

Gain greater clarity and let us help you manage the risks of retirement, preserve your capital and create income to help support the cost of your future lifestyle and goals.

PREPARING FOR THE UNEXPECTED

Create comprehensive strategies that preserve wealth while providing for and protecting your loved ones.

PLANNING FOR MAJOR EXPENDITURES

Ensure you have flexibility with a balanced plan that allows you to take advantage of opportunities and helps make your financial vision a reality.

SHARING YOUR WEALTH

Establish a well-constructed estate plan – tailored to your needs – that allows your legacy to continue on by supporting the causes and people you are passionate about.

MAXIMIZING YOUR BUSINESS SUCCESS

Take full advantage and engage holistic strategies to synchronize and enhance your business and personal financial life.

TAX EFFICIENT STRATEGIES

Creating your IG Living Plan

When your financial needs are truly interconnected, you are maximizing your potential and achieving true financial well-being. In other words, once everything is synchronized, you are readier than ever to embrace the exciting opportunities that arise.

Together with your IG consultant, you'll:

01

EXPLORE YOUR CURRENT SITUATION

It all begins with a conversation. We will learn about you and your current financial complexities to help us develop our relationship with you.

02

CLARIFY GOALS AND OBJECTIVES

Every situation is unique. We take the time to explore all the life goals, financial aspirations and concerns you have for yourself and your family.

03

DEVELOP A COMPREHENSIVE PLAN

Your wealth strategy will be tailored to you and your goals. We provide effective, customized strategies to address both long- and short-term needs.

04

CUSTOMIZE INVESTMENT ALLOCATIONS

Managing and growing your wealth requires us to develop a customized asset mix that mitigates risk, seizes opportunities, and minimizes taxes.

05

IMPLEMENT A HOLISTIC STRATEGY

Activate on recommended strategies with a view of the inter-connectivity across all dimensions of your life.

06

PROACTIVELY MONITOR AND ADJUST

As life and family circumstances change, we work with you to identify and present all of your options before adjusting your plan.

An IG Living Plan includes a full suite of products and services

The talent of our global investment partners combined with all of our services produces a full spectrum of opportunities. Built on expertise, guided by discipline, and actively managed with dedicated purpose, our partnerships open up a world of opportunity for you.

INVESTMENTS

- Mutual funds
- Registered Retirement Savings Plans (RRSPs)
- Registered Retirement Income Funds (RRIFs)
- Registered Education Savings Plans (RESPs)
- Registered Disability Savings Plans (RDSPs)
- Tax-Free Savings Accounts (TFSAs)
- Portfolio funds
- Tax-advantaged funds
- Managed asset program (iProfile)
- Annuities
- Guaranteed Investment Funds (GIFs)
- Guaranteed Investment Certificates (GICs)
- Group retirement services
- Individual pension plans
- Investors Group Charitable Giving Program
- Brokerage services through Investors Group Securities Inc.

BANKING SOLUTIONS

- Chequing
- Savings
- Credit cards

LENDING

- Mortgages
- Loans
- Lines of credit
- Income Protection

LIFE INSURANCE

- Accident/sickness
- Critical illness
- Long-term care
- Health and dental
- Group insurance

Investment expertise

IG's funds and fund managers continually receive marks of distinction in the financial services industry for providing consistently strong risk-adjusted performance.

29 LIPPER AWARDS**

AWARDED IN 20 COUNTRIES FOR MORE THAN 30 YEARS

13 FUNDGRADE A+ AWARDS*

* Awarded to IG since 2012. The FundGrade A+® Award provides investors, advisors, and fund managers with a single, reliable, easy-to-understand fund-performance rating based on up to 10 years of history. (fundgradeawards.com/About.aspx)

** Awarded to IG since 2007. Thomson Reuters Lipper Fund Awards (lipperfundawards.com/Default.aspx)

It takes a team

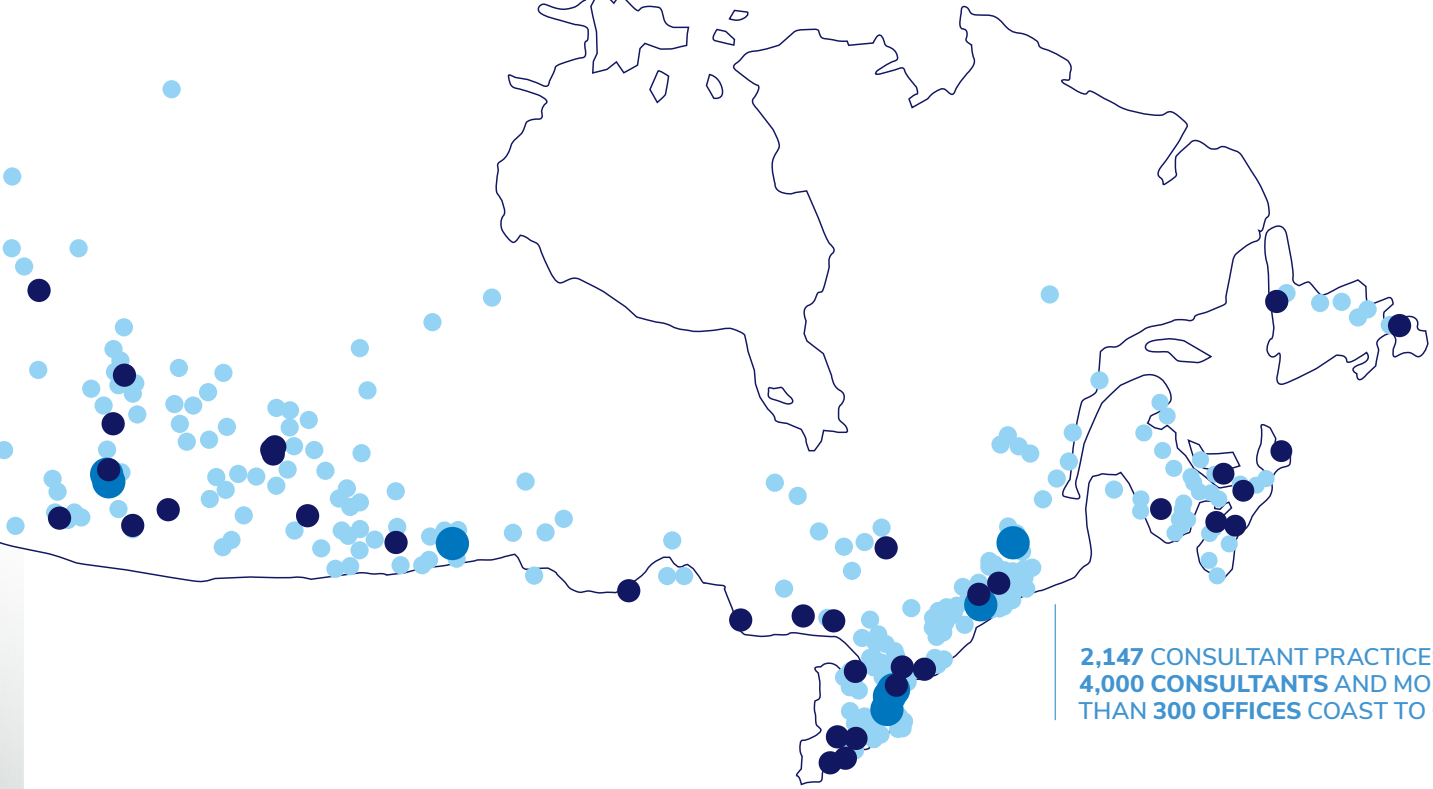
Unlike other financial plans, your IG Living Plan is supported by your IG Wealth Management Consultant. And they connect you to so much more.

Each of our 4,000 IG Consultants is connected to the expertise of the IG Wealth Management team. Our consultants work closely with a team of CPAs, lawyers, tax and estate specialists, and many more.

Whether you have a new career or business opportunity, a new relationship or family addition, or an opportunity for early retirement, having a personal IG Consultant can provide you with all the insights needed to make confident decisions.

By taking the time to understand your concerns and vision for the future, your personal IG Consultant can ensure you're taking advantage of every possibility to minimize taxes and maximize returns.

With an IG Living Plan, we can adapt to any change in your life, so you can say yes to more of what life has to offer.



2,147 CONSULTANT PRACTICES,
4,000 CONSULTANTS AND MORE
THAN **300 OFFICES** COAST TO COAST

IG has a wealth of experience advising Canadians – since 1926

At IG Wealth Management, our expertise goes far beyond managing investments. And, far beyond the numbers.

For nearly a century, we've prided ourselves on putting our clients' best interests and financial needs at the heart of everything we do. That means providing you with more personal and comprehensive planning.

World-class investment management partners

MACKENZIE Investments
BLACKROCK®
PIMCO
T.RowePrice®
Sun Life Financial
FRANKLIN TEMPLETON INVESTMENTS
LaSalle INVESTMENT MANAGEMENT
PANAGORA
BEUTEL GOODMAN INVESTMENT COUNSEL
AGF
THE Great-West Life ASSURANCE COMPANY
Fidelity INVESTMENTS
Manulife Financial
J.P.Morgan Asset Management
Canada Life
Putnam INVESTMENTS

Our strength is in our relationships

At IG Wealth Management, we believe in the power of strong relationships. That part never changes. We often serve the same families for decades and across generations.

- 1,000,000 clients
- #1 CFP/F.PL Professionals[1]
- Over $80 billion in total assets under administration[2]
- Over $8.8 million donated
- 2,147 Consultant practices
- Founded in 1926; 92 years serving Canadians
- 300+ offices coast to coast

Our commitment to you

Your best interests and financial needs are at the heart of everything we do, every day. We do this by:

PROVIDING CONFIDENCE

Your success is our ultimate goal. We will provide clear guidance to help you gain greater visibility and control over your entire financial life.

FOCUSING ON YOU

We will continually earn your trust with our deep understanding of how best to achieve your goals and dreams, through life's ups and downs.

KEEPING YOU INFORMED

We will be transparent with our fees and provide you with ongoing updates tracking your progress toward your goals.

DELIVERING EXCELLENCE

We believe in integrity, courage, innovation and collaboration. We attract and retain a highly talented and diverse workforce.

Power Financial companies

POWER FINANCIAL CORPORATION

IG WEALTH MANAGEMENT

London Life

THE Great-West Life ASSURANCE COMPANY

Irish Life

Canada Life™

MACKENZIE Investments

Putnam INVESTMENTS

[1] Includes FPSC Level 1 Certificants FPSC Aug. 2017
[2] as of Nov. 2017

Are you ready for change?

If you're looking for real change in your financial life, I can show you how a truly synchronized plan will make an immediate impact to both your short- and long-term goals.

Just like an IG Living Plan, my practice at IG Wealth Management is all interconnected. This means I'm supported by a team of dedicated professionals whose insights will allow us to develop a personalized approach that addresses your unique financial picture. More importantly, because that pictures changes over time, we'll be there to help you adapt. Rest assured, we're committed to earning your trust every day by being transparent about fees, updating you on your financial progress, and taking a proactive approach to wealth management.

It all starts with a conversation about what matters to you, and your family.

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IG PRIVATE WEALTH MANAGEMENT
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