



# Experience **The Plan**<sup>™</sup>

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## Innovative product and service solutions

Your financial requirements are supported with a variety of solutions:

### Investments

- ▶ Mutual Funds
- ▶ Tax Advantaged Funds
- ▶ Tax-Free Savings Accounts
- ▶ Segregated Funds
- ▶ Portfolio Funds
- ▶ Retirement Savings Plans (RSP, RIF)
- ▶ Education Savings Plans (RESP)
- ▶ iProfile™ (Managed Asset Program)
- ▶ GICs
- ▶ Brokerage Products and Services available through Investors Group Securities Inc.

### Strategic Investment Planning

- ▶ Symphony™

### Lending

- ▶ Mortgages
- ▶ Loans, Lines of Credit

### Banking

- ▶ Chequing, Savings
- ▶ Credit Cards
- ▶ All in One Accounts

### Insurance

- ▶ Life
- ▶ Disability
- ▶ Critical Illness
- ▶ Long Term Care

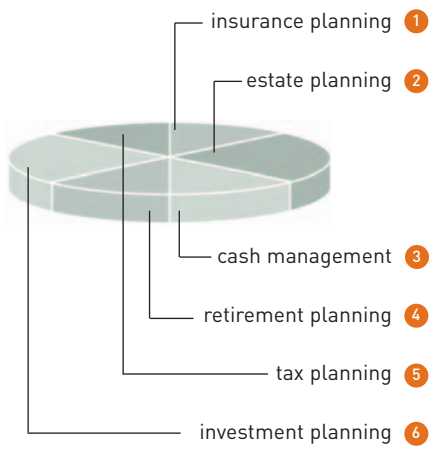
"For many years my wife and I have been looking forward to exchanging the morning commute for a ride across the golf course. Thanks to the discipline and determination of Investors Group, we are enjoying a comfortable retirement lifestyle."

Experience The Solutions



### Six Disciplines of Planning

Our approach is as unique as your individual needs and aspirations. On a one-to-one basis, we apply our Six Disciplines of Planning:



### Making it easy to find good answers

To help you sort through options and find the solutions that are best for you, Investors Group is here to help.

- ▶ With thousands of products and services to choose from, finding the best solution is a daunting and time-consuming task, making it more important than ever to seek sound, professional advice.
- ▶ Changing tax laws, interest rates, currency exchanges and world events continually impact your financial well-being.

### Staying in touch

Your plan is just the beginning. Going forward, we will:

- ▶ Work with you to respond to changes in your personal and financial situation.
- ▶ Regularly review your overall financial picture.
- ▶ Help you adjust the allocation of your assets to make sure they are in line with your financial needs.

Our website: [www.investorsgroup.com](http://www.investorsgroup.com) features daily updates on financial planning information, market activity, and charting and tracking tools for your portfolio.

Our award-winning statement provides clear and concise detail of your investments.

## Experience The Relationship

### ▶ You deserve the value of a personal, lasting relationship.

At Investors Group, we commit our time and energy every day to a personalized approach to help you prosper now and over time.

Our commitment to face-to-face relationships, a proven investment approach, the breadth of our products, and the depth of our management are what make a relationship with us so rewarding.

We look forward to working with you to help you achieve your lifelong financial goals.

Murray J. Taylor  
President and Chief Executive Officer

Relationships for life: a personal approach to helping you achieve your financial goals

## Building relationships that last.



## Experience The Commitment

Exclusive access to world-class investment professionals from I.G. Investment Management, Ltd. coupled with strategic relationships with other leading money managers from around the globe give our Consultants access to all the choice they need when building or adjusting your personal investment portfolio.

### Experience and leadership

We are committed to understanding and respecting your individual goals and helping you achieve peace of mind. You benefit from the expertise and insight of exceptional financial professionals:

- ▶ A dedicated financial consultant, trained to provide you with the products, advice, and support you need for financial peace of mind.
- ▶ Investors Group investment managers and advisors around the globe.
- ▶ Specialists in Advanced Financial Planning, Insurance, Mortgages, and Securities are available to assist in complex planning situations.

### Strength and security

You will have confidence in one of the largest and most respected financial services companies in Canada.

Investors Group has:

- ▶ Over one million clients.
- ▶ More than 80 years of experience serving investors.
- ▶ More than 100 offices from coast to coast.

Investors Group is a member of the Power Financial Group of Companies and is affiliated with The Great-West Life Assurance Company, London Life Insurance Company, and Mackenzie Financial Corporation.

### Asking the right questions

Together we'll explore your goals and objectives, hopes and dreams—

- ▶ for your retirement
- ▶ for your family
- ▶ for your future

Together we'll face realities and find opportunities...

- ▶ To make sure your investments are suitable for your needs.
- ▶ To help you understand the importance of tax planning.
- ▶ To provide the income you need to retire and do the things you want to do.
- ▶ To retire when you want to.
- ▶ To protect your investment portfolio with a sound insurance plan.
- ▶ To transfer your estate efficiently and tax effectively.
- ▶ To give you control over your income.

"Our lifestyle is active. We enjoy travelling and seeing where the road takes us. However, when it comes to retirement, we don't want any surprises, but we do have great expectations. We need an investment plan that will allow us to pursue our goal of an active lifestyle throughout our retirement years."

## Working with you and for you