

**Persistence  
pays off!**



**Win  
\$5,000**

**Persistence  
pays off!**



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Marketing kit  
2023

# Stay the course

## Objectives



1. Secure the average deposit of contributions and PADs and direct to the MY CLIENT SPACE



2. Drive new sales growth for RRSP and TFSA products

## RRSP-TFSA campaign Backed by two supporting messages:

Persistence  
pays off!



Contest:  
win \$5,000



# 4 campaign phases

01

**Campaign launch  
(1<sup>st</sup> November)**

Securing regular contributions

- Equipping advisors
- Warming up clients
- E-mails to clients

02

**Securing contributions  
(November – January)**

Raise awareness and educate people on the benefits of our products

03

**Prospecting and development  
(January – March)**

Development of the current client base and prospection

04

**Post-campaign  
(April)**

Maximizing the tax refund  
(E.g. RESP, TFSA)

# iA Initiatives

to help you achieve your goals



Large-scale digital campaign  
Facebook and Google



Client contest  
\*Double the chances  
before January 31st



Targeted emails  
to inform your  
clients about the  
contest



SECURE THE AVERAGE DEPOSIT OF CONTRIBUTIONS  
AND PADS AND DIRECT TO MY CLIENT SPACE

# Four email templates to reach your clients!



\$5,000 contest : Save and you could win BIG!

RRSP-TFSA: Your winning combo!

Our RRSP calculator: Fast, practical and indispensable!

TFSA : Maximize and reap the benefits!

New TFSA calculator: Simple, quick and practical!



EASY TO USE : CLICK AND SEND

# Resources for **your clients**



## [My Client Space](#)

RRSP-TFSA  
contribution tools



## [RRSP Calculator](#)

With this tool, your  
clients will have an  
overview of the  
amount saved at  
retirement!



New!

## [TFSA Calculator](#)



EASY TO USE : CLICK AND SEND

# Market volatility



## Compilation of client support content

Here you will find the most relevant publications to help your clients during the current period of market instability: articles, podcasts, informative charts, etc.

This content covers various topics related to stock market volatility: inflation, rising interest rates, bond market, recession, geopolitical conflicts, etc.



# Advice Zone articles



## 10 tips to beat inflation

High inflation will likely be here for a while. Here are some concrete and simple actions you can put into practice to face it worry free.



## Rising interest rates and your finances in 5 questions

Here's a few answers to questions you may have about the effects of rising interest rates on your personal finances.



## Advice in times of market volatility

Economics, inflation and market volatility: what are the best strategies to take? Follow these tips to stay informed as an investor.



## What is a recession?


Signs of a potential recession are increasingly circulating in the public space. Here are some insights to help you understand this economic phenomenon.



## Better Returns for GIFs and HISAs

Rising interest rates have multiple impacts. Beyond the various declines observed, they have had a positive effect on the returns of GIFs and HISAs offered by iA.



To share with your clients! 



# Your iA CONNECTED articles

September 8

- [Policy rate increase, the Bank continues its tightening](#)

July 14

- [Historical policy rate increase | Impacts and perspectives](#)

June 17

- [Economy | Your clients are worried about a recession?](#)

June 17

- [IN YOUR INTEREST! | New iA Financial Group podcast](#)

June 2

- [Second consecutive 0.50% policy rate increase | Impacts and perspectives](#)

May 13

- [Interest Rate Increase | Better Returns for GIFs and HISAs](#)

April 22

- [Bond market downturn | Explanations and outlook for your clients](#)

April 14

- [Policy interest rate increased by 0.50% | Impacts and perspectives](#)

March 10

- [Stock market volatility | How to behave on social media?](#)

February 25

- [Ukraine-Russia Conflict | Financial Perspectives](#)

February 17

- [Stock market volatility | What to invest in?](#)

February 4

- [Stock market volatility | More insights for your clients](#)

January 28

- [Stock market volatility | How to best support your clients](#)

**iA CONNECTED**

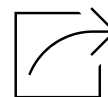
Find some articles to help your clients during the current period of market instability

# Podcast with Sébastien Mc Mahon



- [6 tips to beat inflation](#)
- [Rising interest rates: are there any upsides?](#)
- [Preparing for retirement: questions to ask your advisor](#)
- [Should we be worried about a recession?](#)
- [Bull markets and bear markets: what are they and how do we navigate them?](#)
- [The Canadian economy: why is it in good shape?](#)
- [Inflation vs stagflation?](#)

To share with your clients!



# Keep in mind: there are many opportunities despite the economic context

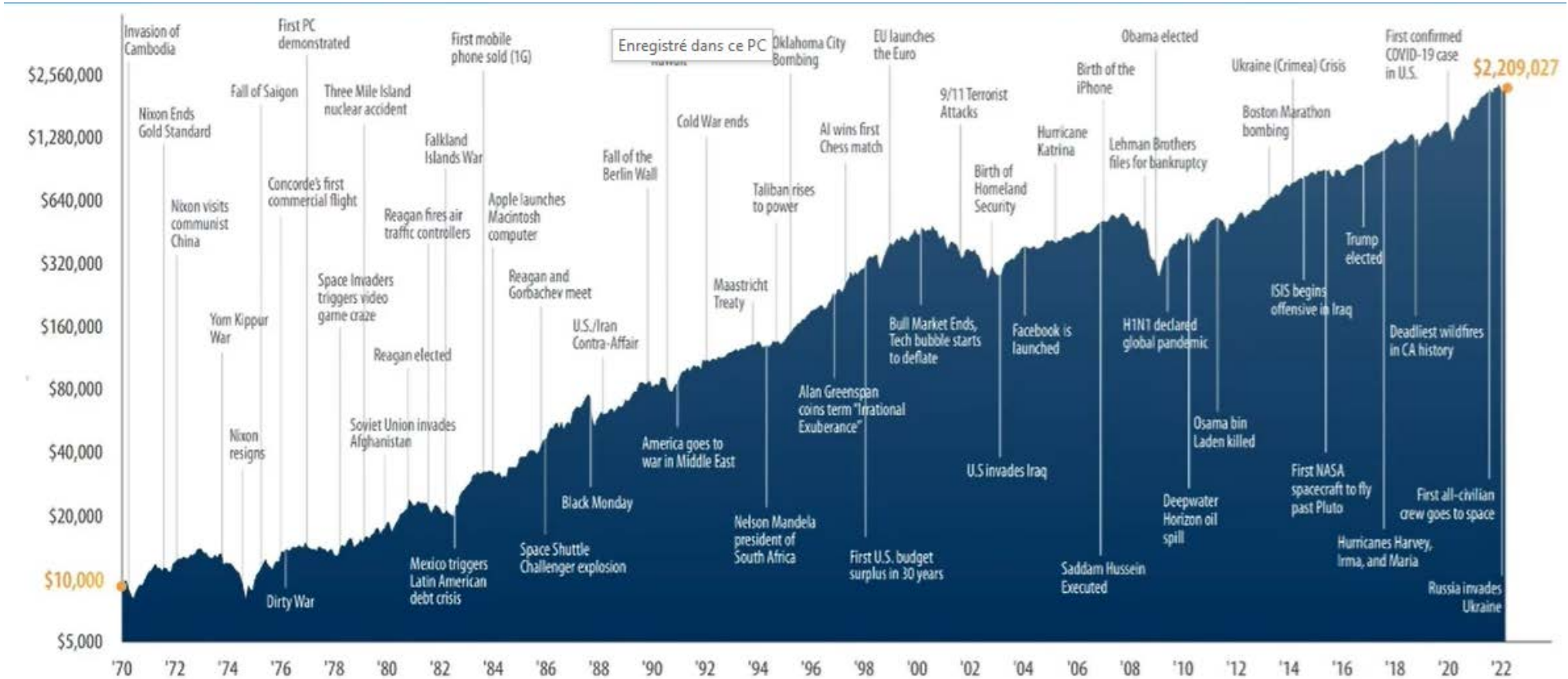
## A good time to invest ?



**The period of despair is also the period with the greatest opportunity for gain!**

[F13-834A – The cycle of investors emotions on the stock market](#)

# Stay the course! In the long run, markets tend to go up!



Source : First Trust