

Take complete control of your investments



Investia Nominee Accounts

One Account.
One Institution.

Investia offers you an integrated solution which makes it easier to manage your various assets. Keeping them all in a single nominee account at Investia makes it easy to keep track of all your investment products, including your non-registered accounts, your tax-free savings accounts (TSFAs), your retirement savings accounts and your group retirement savings plans, just to name a few.

Just a few of the advantages:

- ✓ **Less paperwork** when opening accounts and with subsequent transactions
- ✓ **Simplified tax slips** in preparation for your annual income tax declaration
- ✓ **Consolidation of your holdings** for a better overview of your investments



Simplify your transactions

Investia nominee accounts offer more flexibility when it comes to transactions:

Electronic funds transfer

An Investia nominee account allows you to transfer funds with just a few clicks of the mouse, and eliminates the need to issue a cheque.

- Easy transfers from your bank account
- Reduced investment delay
- Completely secure process

Remote transactions

Certain purchase, redemption and exchange transactions can be done remotely through your advisor without the need for you to complete or sign forms in person.

- For transactions which you have authorized

Simplified automatic transactions

Are you looking to make periodic investments instead of a single annual contribution? Why not benefit from our Pre-authorized Chequing Plan (PAC)?

- PAC: bank withdrawals available every day of the month

Do you want to make the most of disbursement products (RRIF, LIF)? Our Automatic Withdrawal Deposit (AWD) program lets you withdraw a set amount periodically instead of making a single withdrawal.

- AWD: bank deposits available on the 15th, 25th and 30th day of each month

Strategic use of cash account assets

Not ready to invest just yet? An Investia nominee account also gives you the flexibility to hold money in the cash account not invested until you have had time to assess the various investment options available to you with your advisor.

- Interest is paid on the cash holdings based on the current interest rate
- An annual contribution receipt will be issued to you for each deposit (RRSP only), whether the money is invested or remains in the cash account





Benefit from expert advice at a better rate

In collaboration with your Investia advisor, our dedicated nominee account administration team provides personalized and high-quality service. Our annual fees are competitive and include several no-cost transactions, including outgoing transfers.

Competitive price per client and not per account

- If your nominee assets total \$25,000 or more
 - ▶ Annual fee: \$100
- If your nominee assets are less than \$25,000
 - ▶ Annual fee: \$50

* Fees are taxable and subject to change with 60-day notice. Please refer to the Investia Nominee Accounts Fee Schedule for more details.

Contact your Investia advisor today

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INVESTED IN YOU.

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