

Dear valued client,

**IMPORTANT INFORMATION ABOUT YOUR ACCOUNTS**  
**Change is on the way! Our focus on you and the future.**

We are preparing to move all your account records to a new, modern, digitally-enabled platform so we can offer you more features and choices, greater transparency of fees and new account offerings in the future. Accounts will be moved throughout 2019.

**Note: This change will result in a new account number for your account(s).** There is no action required from you to make any of this happen, but read on to find out more about exciting new features that are on the way in 2019!

**What isn't changing**

- Your account holdings will not change.
- Any scheduled services (deposits, withdrawals, RRIF payouts) on your accounts will continue without interruption.
- There are no additional administration, account or trade fees.
- Your financial plan and your relationship with your IG Consultant will not change.
- Accounts are covered by the MFDA Investor Protection Corporation (MFDA IPC) established by the Mutual Fund Dealers Association of Canada (MFDA).
- You will continue to receive the same account mailings from us as you do today.

**What's changing and new features**

**1. We are transferring your account(s) to a new platform in 2019**

After your account is moved you will have access to these new features:

- The ability to use your bank's online bill payment feature to deposit directly to your accounts by entering "Investors Group Financial Services" in the payee name field.
- The ability to consolidate your eligible non-IG mutual funds and GICs into one account for ease of managing your portfolio. Before this can happen, you will need to meet with your IG Consultant to make the necessary arrangements.
- A new cash account to manage incoming and outgoing transactions.

**The move to the new platform prepares us to communicate with you in new ways in the future that will improve your experience with IG Wealth Management. This includes:**

- Electronic delivery of statements and transaction confirmations.
- Online appointment bookings and video chats with your IG Consultant.
- Access to digital forms for easy updates, such as address changes.
- Electronic alerts and notifications for important events (i.e., automatic withdrawals, transfers and annual reviews).
- Increased transparency of your portfolio and fees.
- Mobile accessibility.

**2. You will receive a new consolidated statement**

A new consolidated and easy-to-read statement makes it straightforward for you to keep track of your investment portfolio, transaction history and fees. You can go to our website to register for 24/7 Online Access to your accounts at <https://secure.investorsgroup.com/en/s/registration>. You can also find an

example of the new statement at <https://www.investorsgroup.com/en/support/about-your-client-statement/about-your-client-statement>.

- If you hold an Investors Group iProfile™ Managed Asset Program account, you will no longer receive a separate statement as it will be included in the new statement.
- Joint holdings will now be reported on your own individual statement, along with your individual holdings (if any). You will no longer have to share the joint account statement.

**Note:** After your account is transferred to the new platform you will receive two account statements about a week apart from each other: a final closing out statement showing a zero balance of the account transfer and one in the new format with your new account number and up-to-date balances as of the transfer of each account.

**3. You may receive two tax slips for 2019 (one for your old account number and one for your new account number)**

If a transaction only occurs on your old account number, you will receive only one tax slip. If a transaction only occurs on your new account number (after your account is moved), you will receive only one tax slip. If transactions occur on both the old account number and the new account number, you will receive two tax slips (one for each account number).

**4. The trustee is changing from Investors Group Trust Co. Ltd. to B2B Trustco**

With the change to a new platform, the trustee of your registered plan will change to B2B Trustco which is a federally regulated trust company and is a subsidiary of B2B Trust. All the existing safeguards that you currently enjoy will continue with the new trustee.

**Enclosure: Account Agreements, Relationship Disclosure & Other Information – IGFS (Nominee) – T806 booklet.**

- You will find important information about being a beneficial owner in the *Communication with Beneficial Owners of Securities of a Reporting Issuer* section.
- You can find new trustee information in the *Declarations of Trust* section.

**Your IG Consultant is always ready to help**

To ensure your questions are answered and to discuss your financial needs and goals, please contact your IG Consultant who is always pleased to assist you.

Your financial success and well-being is important to us and we are committed to your best interests and financial needs today, tomorrow and in the future.