



# Access a World of Opportunity with iProfile Private Portfolios







# The world of wealth management is changing—and we're changing with it

At IG Private Wealth Management™ we believe it takes a careful mix of expert financial knowledge and agility to get the best from today's markets. That's why we developed the iProfile™ Private Portfolios. They bring together:

- Trusted, globally respected investment managers
- Time-tested asset allocation processes and diversification strategies
- Personalized oversight from our experienced investment team and your IG Consultant

The iProfile Private Portfolios bring together all of the elements of investing success that help investors like you meet your financial needs and goals.





# iProfile Private Portfolios:

## A comprehensive program for discerning investors

The investment world is complex and ever-expanding. This means that making the right investment choices increasingly demands a disciplined and focused approach, like the investment methods used by large institutional investors and pension funds.

Until recently, bringing together best-in-class expertise from leading asset managers across the globe was not easily accessible to individual investors.

That's why we developed iProfile Private Portfolios.

iProfile Private Portfolios are a comprehensive program that helps investors maintain optimal diversification among different asset classes and management styles based on their personal preferences and investment goals.

### Our fundamental approach: disciplined asset allocation

The iProfile program is built on the established investment theory of strategic asset allocation.

- iProfile Private Portfolios are based on a globally diversified mix of asset classes that aim to deliver superior risk-adjusted returns over the long term.
- This asset mix is monitored by your IG Consultant and can be rebalanced, if necessary, back to the original asset allocation targets set specifically for you.

Whether you are looking for growth of your invested capital, income or a blend of both, there is an iProfile portfolio solution to meet your needs and goals.

The different asset classes within iProfile Private Portfolios may include:

#### EQUITY

- Canadian
- U.S.
- International
- Emerging markets

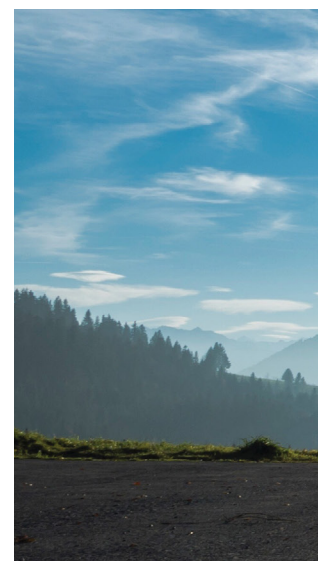
- Fixed income

# How we select iProfile asset managers

In developing iProfile Private Portfolios, we hand-pick asset managers from across the globe who have a proven investment approach and are experts in managing specific asset classes.

This process results in the **iProfile Advantage** — the ability to leverage the knowledge and skills of investment managers who are solely focused on generating risk-adjusted returns. With iProfile Private Portfolios, investors benefit from the expertise of multiple managers around the world, delivering results that reflect a breadth and depth of skilled exposure to global opportunities.

Each asset manager is selected only after comprehensive consultation and a robust review against key criteria. Performance is regularly reviewed to ensure that any required adjustments are proactively implemented.



01

## IDENTIFY POTENTIAL ASSET MANAGERS FOR EACH ASSET CLASS

- Scan universe of available managers
- Identify prospective candidates for screening and review

02

## ASSESS PROSPECTIVE ASSET MANAGERS USING QUANTITATIVE CRITERIA

- Performance against benchmarks
- Sound portfolio construction
- Performance attribution
- Portfolio characteristics
- Risk analysis

03

## ASSESS PROSPECTIVE ASSET MANAGERS USING QUALITATIVE CRITERIA

- Successful and thorough investment philosophy
- Overall experience and stability
- Diversified expertise, not restricted to select individuals
- Low turnover of core personnel
- Robust and structured decision-making procedures
- Depth of research resources

04

## MONITOR AND ADJUST AS NECESSARY

- Continuous review of performance against identified benchmarks
- Formal review at specified intervals (e.g., quarterly)
- Asset manager replacement if performance or process concerns arise





iProfile Private  
Portfolios are created  
for discerning investors  
who seek broad  
diversification and  
expert navigation  
through global  
investment markets.

## The importance of diversification by investment approach

While geographic diversification by asset class is a fundamental principle of our asset allocation approach, so too is diversification by investment style and market capitalization.

Investment approach, or the method and philosophy followed by an institutional asset manager, helps set expectations for risk and performance potential. Within iProfile Private Portfolios, this investment approach is used to add further diversification, aiming to enhance upside potential while managing volatility over time—potentially delivering a smoother and more consistent investment experience to iProfile investors.

Investment management approaches within the iProfile Private Portfolios may include:

### INVESTMENT STYLE

- Core
- Value
- Growth

### MARKET CAPITALIZATION

- Small
- Mid-sized
- Large



# iProfile asset managers

IG Wealth Management™ partners with the following leading asset managers to construct the iProfile Private Portfolios.



**ARISTOTLE CAPITAL BOSTON, LLC**, is a privately owned, registered investment adviser that specializes in small and small/mid-cap equity portfolio management for institutional and individual clients worldwide. Aristotle Capital Boston is one of four independent investment teams that collectively operate under a unified platform known as Aristotle.



**BLACKROCK** is a leading global asset manager, managing approximately USD \$6.96 trillion\* in assets on behalf of investors worldwide. Headquartered in New York, BlackRock operates in more than 30 countries and 70 cities across the Americas, Europe, Asia-Pacific, the Middle East and Africa.



**CHINA ASSET MANAGEMENT CO., LTD. (ChinaAMC)** was founded in April 1998. With USD \$153 billion\* in assets, it is one of the largest asset managers in China. Headquartered in Beijing, with an office in New York and a subsidiary in Hong Kong, the firm invests in the public equity and fixed-income markets.



**I.G. INVESTMENT MANAGEMENT, LTD. ("IGIM")**, is the professional money management subsidiary of Investors Group Inc., a Canadian leader with over 90 years of experience helping Canadians achieve long-term financial security.



**J.P. MORGAN ASSET MANAGEMENT**, one of the world's largest asset managers, is a global leader in investment management. They provide global investment management in equities, fixed income, real estate, hedge funds, private equity, and liquidity. JPMorgan Chase & Co., the parent company of J.P. Morgan Asset Management, is a leading global asset management firm with assets under management of approximately USD \$2.2 trillion\* and operations worldwide.

\*As of December 31, 2021



**MACKENZIE FINANCIAL CORPORATION** is a leading, innovative investment management firm providing investment advisory and related services to retail and institutional clients. The company manages over CAD \$137.5 billion\* in assets and is part of IGM Financial Inc. (a subsidiary of the Power Financial Group of Companies), the largest independent asset manager in Canada.



**PANAGORA ASSET MANAGEMENT INC.** is a privately owned asset manager, managing approximately USD \$43 billion\* in assets. They are a provider of investment solutions spanning most major asset classes and risk ranges.



**PIMCO** is one of the world's premier fixed income asset managers, managing approximately USD \$1.88 trillion\* in assets. They have 14 offices across the globe and 2,300 professionals united by a single purpose—creating opportunities for investors in every environment.



**PUTNAM INVESTMENTS** is a global asset manager serving individuals, institutions and retirement plan sponsors, with offices across three continents. Putnam provides investment services across a range of asset classes and investment styles, with over 100 mutual funds and 60 institutional strategies. They manage approximately USD \$177 billion\* in assets.



**WELLINGTON MANAGEMENT** is one of the world's largest independent investment management firms. With over USD \$1 trillion\* in assets under management, they serve as a trusted investment adviser to more than 2,200 institutional clients and mutual fund sponsors in over 60 countries.



\*As of December 31, 2021



# iProfile Private Portfolios in practice

The iProfile Private portfolios are designed to deliver the iProfile Advantage by combining diversification through strategic asset allocation and various investment management approaches, implemented by multiple asset managers and customized for each investor through their partnership with an IG Consultant.

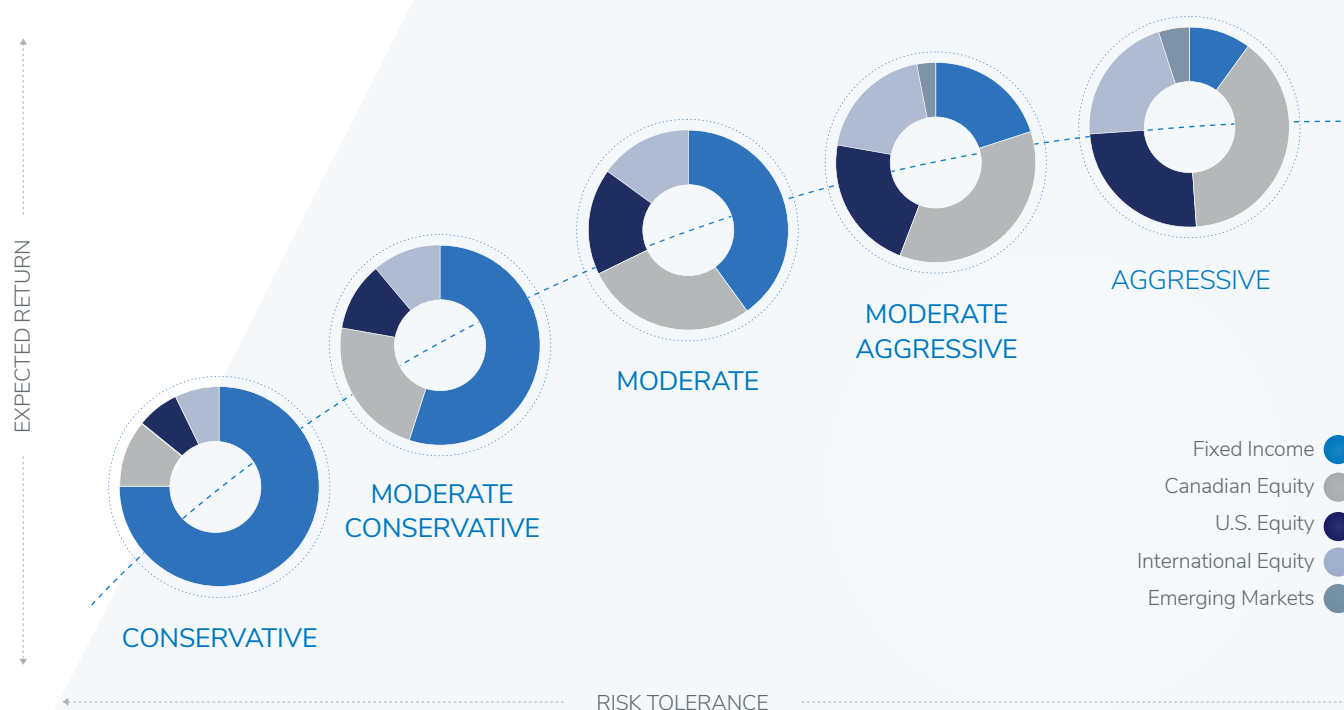


*iProfile Private Portfolios strive for outperformance and protection through market volatility by partnering with best-in-class asset managers from across the globe.*



# Representative iProfile Private Portfolios

The iProfile Private Portfolios offer a range of asset allocations, diversified by geography, market capitalization, and investment style. This diversity of options allows the appropriate solution to be selected for each individual investor, in keeping with their risk tolerance and investment time horizon. With dozens of model portfolios to choose from, your IG Consultant will help make the best choice for your unique situation.



Asset classes and allocations are for illustration purposes only.

## Tax-efficient options<sup>8</sup>

The iProfile Private Portfolios can be adapted to each investor's tax situation to help minimize and defer the effects of income tax on investment growth and income. When investments earn income from interest, dividends, or realized capital gains, some of these gains and/or income are lost to taxation. With iProfile, investors can opt to receive a tax-efficient steady monthly cash flow through the return of capital option.

<sup>8</sup> Series T shares are available on the iProfile Private Pools and iProfile Private Classes (excluding Money Market Class). The cash flow amount is set at the end of each year on or about December 31 for the next year as a percentage of the net asset value per share but may be adjusted or discounted if determined by the Corporation to be in the best interest of the pools/classes.



# Is iProfile right for you?

The iProfile Private Portfolios program is ideal for investors who value personalized advice and a disciplined multi-manager approach to managing their investments that does not require their hands-on involvement to achieve long-term results.

A program advisory fee is charged that is determined by your level of household investments and the iProfile funds you hold. This advisory fee may be deductible for income tax purposes within non-registered portfolios. Your tax advisor can provide further details. For more information about the fees and expenses payable by you or the iProfile Private Pools and iProfile Private Classes, ask an IG Consultant or see the prospectus that is available on our website at **[www.igprivatewealth.com](http://www.igprivatewealth.com)**.

## Getting started: Accessing the iProfile advantage

Access to iProfile Private Portfolios program starts with an in-depth financial planning discovery process with your IG Consultant to identify your personal investment goals, your investment time horizon, and your comfort level with risk and volatility.

Once that process is complete, your IG Consultant will prepare an iProfile Investment Plan that is personalized to you, with full details on your recommended iProfile Private Portfolio program and our ongoing service commitment.





A person in a red jacket is sitting on the edge of a rocky cliff, looking out over a deep blue fjord. In the background, there are rugged mountains with patches of snow under a clear blue sky. The scene is serene and majestic.

# iProfile: The future of investment management for discerning investors

The iProfile Private Portfolios from IG Private Wealth Management allow investors to partner with the strength and dependability of IG Wealth Management while accessing some of the world's leading asset management professionals—all to help ensure your successful financial future.

## iProfile Private Portfolios include:

- Canadian Equity Private Pool/Class
- U.S. Equity Private Pool/Class
- International Equity Private Pool/Class
- Emerging Markets Private Pool/Class
- Fixed Income Private Pool
- Money Market Class



At IG Private Wealth Management, we believe in comprehensive financial advice to change lives for the better. We are committed to helping Canadians feel empowered about their finances and to improving their ability to achieve their personal financial goals by synchronizing all aspects of their financial lives through the IG Living Plan.\*

For more information, please contact your IG Consultant.



[igprivatewealth.com](https://www.igprivatewealth.com) / [f](#) / [t](#) / [v](#) / [in](#)

\*To learn more about the IG Living Plan, visit <https://www.investorsgroup.com/en/why-us/living-plan>

Commissions, fees and expenses may be associated with mutual fund investments and the use of an asset allocation service. Read the iProfile prospectus and speak to an IG Consultant before investing. Mutual funds are not guaranteed, values change frequently, and past performance may not be repeated. Recommendations relate only to Investors Group mutual funds. The iProfile Private Portfolios are for clients with a minimum investment of \$250,000. For more information on this topic or any other financial matter, please contact an IG Consultant. Mutual funds and investment products and services are offered through Investors Group Financial Services Inc. (in Québec, a Financial Services firm). Additional investment products and brokerage services are offered through Investors Group Securities Inc. (in Québec, a firm in Financial Planning). Investors Group Securities Inc. is a member of the Canadian Investor Protection Fund. Insurance products and services distributed through I.G. Insurance Services Inc. (in Québec, a Financial Services Firm). Insurance license sponsored by The Great-West Life Assurance Company (outside of Québec).

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