

WHO WE ARE

A member of iA Financial Group, Investia Financial Services Inc. has been in operation since 1988. Now the largest independent mutual fund dealer in Canada, Investia offers a wide range of products and services associated with the distribution of mutual funds and segregated funds.



130 years of stability

Investia Financial Services Inc. is a wholly owned subsidiary of iA Financial Group.

Founded in 1892 and one of the largest life and health insurance companies in Canada, iA Financial Group contributes to the financial wellbeing of more than **5 million clients**, employs **over 9,500 people**, and administers and manages **over 229.3 billion dollars** in assets.*

*Data as at March 31, 2024



Data as at June 30, 2024

*A solid, well-established business family,
looking to the future with confidence.*



OUR PRODUCTS

Investia offers the majority of the mutual funds available in Canada to fulfill the savings and retirement needs of individuals.



Our savings and investment products

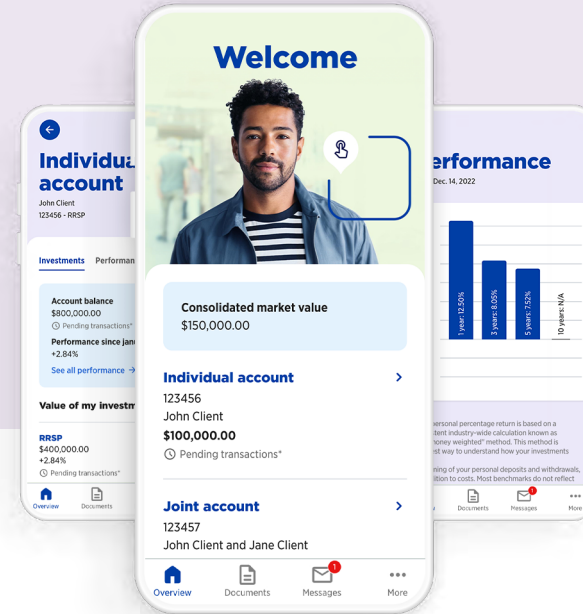
- **TFSA** (tax-free savings account)
- **LIRA** (locked-in retirement account)
- **Non-registered savings**
- **RRIF** (registered retirement income fund)
- **LIF** (life income fund)
- **RRSP loan**
- **RESP** (registered education savings plan)
- **RRSP** (registered retirement savings plan)

Our specialty: mutual funds

Mutual funds are based on a simple principle: pooling your money with that of many other investors in order to offer you access to global markets and a large selection of investments, as well as the flexibility to invest whatever you want, whenever you want.

A SOLID FOOTHOLD IN THE DIGITAL WORLD

Investia provides you with a host of digital tools to make your life easier.



Websites and app to track your progress

Our website investia.ca

Our website contains a wealth of information about the values that set us apart from our competition, our products and services and our team of advisors and experts. [Visit it now!](#)

Our Client Portal

Our Client Portal gives you direct access to your investments and our advice. From the Client Portal, you can:

- Stay up-to-date on the progress of your investments.
- Access to detailed information on your investments.
- Contact your advisor easily and quickly.

In addition, the Client Portal enables you to protect your accounts with [multi-factor authentication](#).

Our mobile app

Our free app is designed to help you keep track of your investments.

The Investia app: designed to simplify your life!

- Access your accounts quickly, at any time
- See your investment balance
- Contact your advisor using the “Contact us” section
- Review and download your electronic documents
- Log in with biometric authentication (Touch ID or Face ID)
- Securely send documents and messages to your advisor
- Check the rate of return on your investments
- Track the evolution of your investments over time
- Modify your personal information (address, phone number, etc.)

Inspiring calculators

[RESP Calculator](#)

Calculate the amount you will have saved by the time your child starts post-secondary education.

[RRSP Calculator](#)

Estimate how much you can save with your RRSP in order to achieve your goals.

[TFSA Calculator](#)

Estimate how much you can save with your TFSA in order to achieve your goals.

THE INVESTIA EXPERIENCE

Our team of advisors takes the time to listen to you in order to provide you with the best possible solutions.



Our Commitment

KNOW you

To get to know you, first we have to talk about you

We want to know and understand you. What are your values? What are your dreams, your ambitions? By talking with you, we will be able to propose an action plan based on what you want, what defines you.

ADVISE you

Our advisors talk to you about more than just money

Our experienced and knowledgeable advisors will help make your plans a reality. By listening to you and using their expertise, they will propose a clear and effective plan which will help you reach your goals.

GUIDE you

Our advisors are not just there for your retirement

Anything can happen along the way! Your advisor is there to help keep you focused on your goals. Our advisors have a wide range of tools adapted to each situation to help you make sound financial decisions.

Simplicity, right from the start

We help you take stock of your finances and define your priorities to facilitate the first meeting with your advisor.

Your advisor proposes an action plan customized to your plans and your situation.

Your action plan will continually evolve and adapt to the major changes in your life through periodic meetings with your advisor.

The value of an advisor

Studies show that by seeking the services of an advisor, you will have about **4.2 times the assets** than by not being advised.

Meeting regularly with your advisor allows you to review your investments and adjust your plan according to changes in your situation. Your advisor will also ensure that your insurance needs are up to date.

[Find an advisor](#)

INVESTED IN YOU.

Investia Financial Services Inc. is a wholly-owned subsidiary of **Industrial Alliance Insurance and Financial Services Inc.**, a life and health insurance company which operates under the trade name iA Financial Group.

investia.ca

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