

Contribution tool in My Client Space

The screenshot displays the 'My Client Space' interface. At the top left is the 'iA Financial Group' logo. The main header includes 'Home' and 'Your products' with a dropdown arrow, and a 'Log Off' button with a user icon. A left sidebar contains sections for 'INDIVIDUAL SAVINGS AND RETIREMENT' (with 'Overview' and 'RRSP' links) and 'USEFUL LINKS' (with 'Interest rate' and 'Investment fund performance' links). The main content area is titled 'Overview' and greets the user with 'Hello [blurred]'. Below this is a large blue banner with two panels: the left panel shows a piggy bank icon, a dollar sign, and the text 'Value of your savings as at July 21, 2020' with an 'RRSP \$' button; the right panel shows a bar chart icon and the text 'Your return since January 1st 2020' with an 'RRSP %' button. Below the banner is a white box with the text 'Contribute to your savings!' and a blue 'Contribute now' button, which is highlighted with a red box and a red arrow pointing to it from the right. At the bottom, a white box contains a disclaimer: 'The rates of return take into account deposits and surrenders and when these occurred. They do not include Daily Interest Fund+, High Interest Savings Account and Guaranteed Interest Funds. Your contracts are grouped. Some contracts, including loans and high-performance TFSAs are not included in the overview.'

INDIVIDUAL SAVINGS AND RETIREMENT

Overview

RRSP

Contract specifications

Balance

Rates of return and performance

Contribute

Investments

Bank withdrawals

Summary of contributions

Investment instructions

Transactions

Guarantee information

Your documents

USEFUL LINKS

XXXXXXXX - XXXXXXXX - RRSP



Balance



Investment funds
High Interest Savings Account

\$
\$

Balance as at July 21, 2020

\$

For more details on your balance, consult your [Transactions](#).



● Contribution

● Investment

● Banking information

● Summary

CONTRIBUTION



RRSP CONTRIBUTION LIMIT

The limit for an individual is fixed at 18% of their salary from the previous tax year, up to the maximum established yearly by the government (whichever is less). If past unused contributions are available, they can be added to this amount.

To know the maximum RRSP contribution amount, an individual can consult their last Notice of Assessment. It is also possible to consult the CRA *My Account* website or to contact the Tax Information Phone Service (TIPS) by calling 1-800-267-6999.

Type of contribution

One-time contribution

Amount

\$ 1,000.00

Payment date

2020-07-22

YYYY-MM-DD



Client with an Automatic Investment Term (AIT) on file

✓ Contribution

● Investment

● Banking information

● Summary

INVESTMENT

Choose how your contribution should be invested.

- Preestablished investment instructions
- High Interest Savings Account

The High Interest Savings Account is risk free. It offers high yield with no minimum investment and it's flexible, since withdrawals can be made at any time.



INVESTMENT

Choose how your contribution should be invested.

- Preestablished investment instructions

42330 - Thematic Innovation

Classic Series 75/75

DSC - Deferred Sales Charge

25.00%

44090 - Canadian Equity Small Cap (QV)

Classic Series 75/75

DSC - Deferred Sales Charge

25.00%

46100 - Bond

Classic Series 75/75

DSC - Deferred Sales Charge

50.00%

100.00%

According to the client's AIT. The percentages cannot be modified.

Client without an Automatic Investment Term (AIT) on file

iA Financial Group FR

Contribution - **RRSP** 33 % Cancel request

INVESTMENT

Choose how your contribution should be invested.

- Funds currently in the contract
- High Interest Savings Account

The High Interest Savings Account is risk free. It offers high yield with no minimum investment and it's flexible, since withdrawals can be made at any time.

← →

INVESTMENT

Choose how your contribution should be invested.

Funds currently in the contract

4520 - Strategic Income Standard Series DSC - Deferred Sales Charge	25.96%
670 - Diversified Standard Series DSC - Deferred Sales Charge	28.52%
675 - Global Dividend (Dynamic) Standard Series DSC - Deferred Sales Charge	6.27%
695 - Dividend Growth Standard Series DSC - Deferred Sales Charge	4.93%
High Interest Savings Account	34.32%
	100.00%

Pro-rata in existing funds. The percentages cannot be modified.

Client without an Automatic Invest Term (AIT) on file,
invested in capped funds and/or Guaranteed Interest
Funds

FR

Contribution - [REDACTED] - RRSP [REDACTED] 33 % Cancel request

- ✓ Contribution
- Investment
- Banking information
- Summary

INVESTMENT

Your contribution will be invested in:

High Interest Savings Account

The High Interest Savings Account is risk free. It offers high yield with no minimum investment and it's flexible, since withdrawals can be made at any time.

←

→

- ✓ Contribution
- ✓ Investment
- Banking information**
- Summary

BANKING INFORMATION

Banking information is available. It can therefore be imported, or new information can be entered.

National Bank
Account no.: [REDACTED]

Royal Bank
Account no.: [REDACTED]

Bank of Montreal
Account no.: [REDACTED]

Please enter the banking information to be used.

Type of account

Personal

Account holder(s) ⓘ

[REDACTED]

1 Branch number

[REDACTED]

2 Institution number

[REDACTED]

3 Account number

[REDACTED]

To find banking information on a void cheque:

YOUR NAME	162
ADDRESS	DATE
CITY, PROVINCE, POSTAL CODE	
PAY TO THE ORDER OF	\$ [REDACTED]
	/ 100 DOLLARS
MEMO	MP
1 2 3	
⑆ 1 6 2 ⑆ ⑆ 1 2 3 4 5 ⑆ 0 0 0 ⑆ ⑆ 1 2 ⑆ 3 4 5 ⑆ 0 0 ⑆	

- ✓ Contribution
- ✓ Investment
- ✓ Banking information
- Summary

SUMMARY

Contract

Type of registration
RRSP - Registered Retirement Savings Plan

Contract number	Product Ecoflex
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One-time contribution [Edit](#)

Amount \$1,000.00	Payment date July 22, 2020
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Allocation of the one-time contribution [Edit](#)

Strategic Income 4520	Standard Series DSC	25.96%
Diversified 670	Standard Series DSC	28.52%
Global Dividend (Dynamic) 675	Standard Series DSC	6.27%
Dividend Growth 695	Standard Series DSC	4.93%
High Interest Savings Account		34.32%

Banking information [Edit](#)

Type of account Personal	Account holder(s)
Branch number Verify	Institution number Verify
Account number Verify	Institution name National Bank of Canada

Signature

I request that the transactions indicated in this request be carried out in accordance with the stipulations of my Contract.



Thank you, [REDACTED]

Your contribution request has been successfully processed.
A confirmation email has been sent to you.

The documentation will be available in the *Your documents* tab within one business day at the latest.