

2025 VIRTUAL BEST BUSINESS PRACTICES ROADSHOWS



AGENDA

Monday, June 2

1:30 to 1:45 p.m.	State of the Union	Louis H. DeConinck , President Investia Financial Services Inc.
1:45 to 2:15 p.m.	Advisor Workgroup <ul style="list-style-type: none">- Mandate and objective- National Business Conference- Tools and initiatives currently underway: tests and pilot projects	Frédéric Laverdière-Pagé , Vice-President, Sales and Business Development – Canada at Investia , will be joined by two advisors part of this group
2 :15 to 3 :30 p.m.* <i>*including a 10-minute break</i>	Transition to MS Office 365 & New AI Agent <ul style="list-style-type: none">- New AI-powered virtual assistant: what is it?- Pilot project (V1)- Advisor migration to O365 – FAQ	David Chapman , Chief Operating Officer at Investia , will be joined by a panel of experts

Tuesday, June 3

1:30 to 2:25 p.m.	Economy, markets and politics: The times, they are A-Changin	Sébastien Mc Mahon , Vice-President, Asset Allocation and Chief Strategist, Senior Economist and Portfolio Manager Étienne Bergeron , Associate Director, Macro Strategy, Asset Allocation iA Global Asset Management Inc.
2:25 to 2:35 p.m.	Break	DJ MAD

2:35 to 3:30 p.m.	iA Financial Group Global Marketing Strategy for 2025 <ul style="list-style-type: none"> - New partnership with K72: new brand image and initiatives underway - The strength of the group: marketing support, new tools, net promoter score (NPS) survey 	Vincenzo Ciampi , Senior Vice-President, Global Client Experience iA Financial Group
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Wednesday, June 4

1:30 to 2:25 p.m.	Elite Pools and Portfolios <ul style="list-style-type: none"> - Overview of pools and portfolios and eligibility - Benefits for advisors and clients - Frequently asked questions (pricing, performance, reference materials, etc.) 	Frédéric Laverdière-Pagé , Vice-President, Sales and Business Development – Canada at Investia , will be joined by a panel of experts
2:25 to 2:35 p.m.	Break	DJ MAD
2:35 to 3:30 p.m.	Process Review – Optimizing your Business <ul style="list-style-type: none"> - The power of automation - Portfolio rebalancing tool - New nominee fee-based account agreement - New estate processing tool 	Nathalie Perron , Program Director, Business Efficiency at Investia , will be joined by a panel of experts

Thursday, June 5

1:30 to 2:15 p.m.	The opportunity in Europe Dan Janis will discuss his perspectives on the global bond market. Especially, the opportunity that his team sees in Europe and the impacts of the Trump administration measures on the long-term trajectory of the US dollar.	Dan Janis , Chief Investment Officer Agile Investment Management LLC Nicholas Tremblay , Senior Vice President, Regional Sales and Key Accounts iA Clarington Investments
2:15 to 2:25 p.m.	Break	DJ MAD
2:25 to 3:10 p.m.	The AI tsunami	Nicolas Darveau-Garneau , Artificial Intelligence Strategic Advisor iA Financial Group
3:10 to 3:30 p.m.	Closing Remarks and Question Period	Louis H. DeConinck , President, Investia Financial Services Inc.