IG WEALTH MANAGEMENT

IG Wealth Management 2021 Retirement Media Guide

Winnipeg, MB – January, 2021: The pandemic has changed the way that Canadians live and work – and presented a unique opportunity to re-evaluate financial goals and plans – whether related to their retirement, or as part of their overall financial picture.

IG Wealth Management has highly knowledgeable financial planning and wealth management experts. They are available to provide insight and commentary on a wide variety of topics related to retirement and financial planning as Canadians continue to navigate the COVID-19 landscape, including:

- Why comprehensive financial planning can help Canadians prepare for the unexpected
- The importance of family conversations around estate and retirement planning
- Retirement income planning, saving and investing strategies
- Retirement plan changes due to COVID-19
- Market volatility and retirement planning in 2021
- Tax strategies for individual retirement (including mass affluent and high-net-worth investors and business owners)

To set up an interview with any of these individuals, please contact:
Rebecca Ellison, Manager, Corporate Communications
Email: rellison@mackenzieinvestments.com
Phone: 647-983-4963

Brent Allen, CFP, FMA
Senior Vice-President, Financial Services, IG Wealth Management
Brent is focused on leading key transformational initiatives and strategy development support across IG's financial advisor network. He is responsible for field practice support functions including consultant education, training, change management and diversity and inclusion initiatives.

Areas of expertise:
- The evolving role of the financial advisor through career cycles and retirement for clients
- Best practices for intergenerational wealth management
- The value of advice and how it increases financial well-being
- Client retirement trends and challenges

Christine Van Cauwenberghe LL.B., CFP, TEP, RRC
Vice-President, Tax & Estate Planning, IG Wealth Management
Christine provides advice to high-net-worth clients on complex retirement, tax and estate planning matters. She also manages a team of professionals, including lawyers, notaries, accountants, and pension experts.

Areas of expertise:
- Wide range of issues related to retirement and the taxation of individuals, couples, families, trusts and estates
- Intergenerational wealth transfer and succession planning
- Provincial laws related to estates, family property and disability
- Blended families, common-law couples, separation and divorce

*Note: Aurèle is bilingual (English and French).

Aurèle Courcelles, CPA, CMA, CFP, TEP, RRC, FP CANADA™ FELLOW
Assistant Vice-President, Tax & Estate Planning, IG Wealth Management
Aurèle specializes in tax and estate planning for individuals and owner-managed companies. He regularly provides advice on the taxation of investment income in the context of overall planning for clients' retirement and overall financial futures.

Areas of expertise:
- Tax efficient retirement income strategies
- Saving for retirement – RRSP vs. TFSA: which is right for you?
- Retirement planning for the small business owner
- Goal setting for retirement

Jack Courtney, B.A., LL.B., TEP, CFP®, FP CANADA™ FELLOW
Vice President, Advanced Financial Planning
Jack leads the Advanced Financial Planning team at IG Wealth Management and coordinates planning support for high-net-worth clients. He specializes in working with owner-managers of private companies on issues relating to tax planning, business succession, executive compensation and trusts.

Areas of expertise:
- Tax strategies for small- and medium-sized business owners navigating through COVID-19
- Succession planning for private businesses
- Tax, estate and financial planning advice for high-net-worth Canadians

Craig Hughes, LL.B., CFP, TEP
Director, Tax & Estate Planning, IG Wealth Management
Craig specializes in estate planning and personal tax planning and provides support on registered retirement plans and products.

Areas of expertise:
- Building a tailored retirement strategy from saving for retirement, transitioning into retirement and after retirement
- Family-focused estate and tax planning
- The best ways to give in a tax efficient manner and how charitable giving fits into your estate plan
- Effective use of registered plans such as RESP, RDSP, RRSP, TFSA, DPSP and IPP

Jon Kilfoyle, CFA
Senior Vice-President, IG Investments, IG Wealth Management
Jon is responsible for the leadership and strategic direction of IG Investments, which develops investment solutions that are distributed through an exclusive network of consultants aimed at helping Canadians achieve optimal financial outcomes for retirement.

Areas of expertise:
- Investment products, pricing and performance
- Asset allocation and portfolio construction
- Managing your portfolio for retirement income
- Sustainable Responsible Investing

Mariska Loeppky, CPA, CA, TEP, CFP
Director, Tax & Estate Planning, IG Wealth Management
Mariska has extensive experience in providing estate, retirement and corporate tax planning. She specializes in advice for for mid to large owner-managed companies in a variety of industries.

Areas of expertise:
- Tax strategies for retirement, especially when selling a business
- Corporate tax planning for private companies including succession planning
- Real estate considerations for estate and retirement planning
- Planning for individuals with cross-border issues

*Note: Gaetan is bilingual (English and French).

Gaetan Ruest, FSA, FCIA
Vice-President, Data Science & Advanced Analytics, IGM Financial Inc.
Gaetan leads a team of technical experts who transform data and research into actionable insights using advanced analytics and artificial intelligence capabilities.

Areas of expertise:
- The science of financial well-being and investor behaviour during market volatility and when preparing for retirement
- Canadian financial planning and retirement saving trends
- Behavioural finance in relation to retirement and estate planning

About IG Wealth Management

Founded in 1926, IG Wealth Management is a national leader in delivering personalized financial solutions to Canadians through a network of Consultants located across Canada. In addition to an exclusive family of mutual funds and other investment vehicles, IG offers a wide range of other financial services. IG Wealth Management has over $103 billion in assets under management as of December 31, 2020 and is a member of the IGM Financial Inc. (TSX: IGM) group of companies. IGM Financial is one of Canada’s premier financial services companies with approximately $240 billion in total assets under management as of December 31, 2020.