

BANK BRANCH EMPLOYEE 20M+ / FULL SERVICE BROKERAGE / INDEPENDENT DEALERS / FULL SERVICE MUTUAL FUND DEALERS \$20M-\$50M

Client Services Operations	Review your practice and share our product shelf capability and philosophy	✓
	Personalized Transact, systems and account opening training	✓
	Dedicated account opening assistance	✓
	Flag account applications for first 60 days for improved quality control and expedited processing	✓
	Dedicated group of Contact Centre support assigned for first 60 days	✓
	Self serve weekly transfer reports available (provides progress of all in flight transfers)	✓
Marketing Support Area Field Marketing support, launch event, client scripts, social media support	✓	
Technology Support Device suitability support, on demand technology support	✓	
IG Investments Product Shelf/Philosophy presentation	✓	
Planning Specialist Network Specialists presentation to understand holistic support that's available	✓	
Compliance Introduction to your Compliance Manager	✓	
Project manages your overall onboarding experience Overall onboarding experience project management	✓	