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THINGS TO KNOW FOR



January 2022



Online Portal – Secure Document Sharing

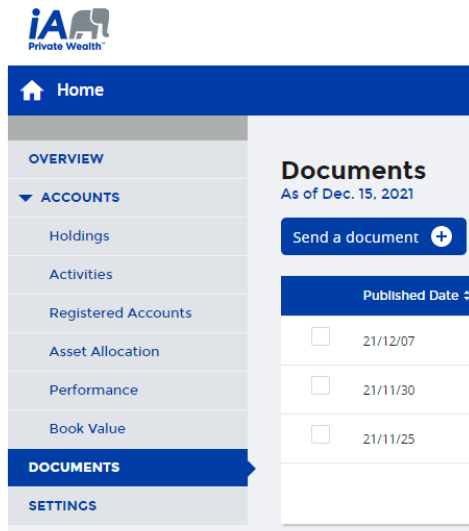
Here is another great reason for you to sign up for the iA Private Wealth Online Portal!

We strive to embrace new technology and are always looking for ways to further protect your privacy. This new feature to the Online Portal provides a safe and secure way to share important documents AND it is also easy and efficient to use!

Those that have already signed up for the iA Private Wealth Online Portal have provided us with feedback and appreciate having features such as instant views of holdings, recent activities, asset allocation, and more!

We highlighted how to sign up in our March and June 2021 newsletters. If you missed it, please connect to the “News” section within our website at <https://www.flagstonefinancialgroup.com/> or call the office at 519 245 7778 and April Beierling would be happy to assist.

If you have scanning capabilities at home or at work, you can also share important documents directly with us. It is as simple as logging into the Client Portal and selecting:



1. Documents (left navigation bar)
2. Send a document (as illustrated)
3. Select an account that the document is most relevant to, or any account if general
4. Attach the document
5. Press 'Send'

This is not an e-signature solution but rather a safe and secure way that documents such as CRA statements, investment statements, letters, and more can be shared conveniently between you and us.



Business Update

New Hours are here!



We shared in the December 2021 newsletter that we are modifying our office hours and here we are!

Effective **January 1, 2022** the Flagstone office hours adjusted to:

Monday through Thursday 8am – 5pm

Friday 8am – 2pm

Other times by appointment

Over the past years, we have introduced summer hours for the months of June, July, and August by closing our office at noon on Fridays. These new hours have replaced our previous summer hours throughout the entire year.

We are very comfortable that these new hours will allow us, as always, to meet the needs of our clients while giving our staff a year-round balance of home and work.

We will continue to monitor our office phone on Friday's until 4pm to ensure that any important or time sensitive calls are received and acted upon.



TFSA Contribution Limit for 2022

Tax-Free Savings Account

CRA has released the 2022 TFSA contribution limit as **\$6000** again this year. This will bring the total room available in 2022 for someone who has never contributed and has been eligible for the TFSA since its introduction in 2009 to **\$81,500**

Did you know that tax-free savings accounts (TFSAs) are designed to help Canadians save more by allowing you to hold a wide range of investments including GICs, bonds, stocks, mutual funds and EFTs?

Be sure you are putting growth assets to work for you in your TFSA! Call us anytime at 519-245-7778 to discuss your options.



Marg Brown Administrative Assistant



Marg is often the first voice you hear at Flagstone Financial Group and iA Private Wealth, especially if you call the office right at 8am! Beyond her day to day contributions to the office, she also makes an incredible pot of coffee!

As a Strathroy resident all her life, nearly 17 years with our team and over 40 years of industry experience, we are confident that Marg has connected with each of our clients in some way. Not only is she a key member within the Administrative team here at Flagstone, she is a valued resource for the many questions, processes, documentation and she strictly upholds all policy and procedural components with a genuine flair and attention for detail. Marg is very well versed and knowledgeable about adherence to industry compliance standards which truly is the cornerstone of our business.

Here is an overview of the day to day responsibilities that fit within Marg's role at Flagstone:

- Official point of contact for administration of all client account from account opening through all stages of account management
- Reviews the trades processed and any required/related adjustments to accounts to ensure accurate, timely and compliant client accounts
- Raises industry related updates, and highlights issues of change or concern that are essential to our client care
- Provides seamless follow through and follow up for client related as well as internal tasks or requests
- Investigates and resolves client related questions or issues, often for complex situations
- Partners and consults with all internal and external resources within the iA Private Wealth dealer relationship on many different subjects
- Leads high impact and important, seasonal administrative projects such as Annual Administration Billing (Trustee Fees), Year End Tax Planning
- Estate file management
- Responds directly to clients with information and answers

On a personal note, Marg enjoys working in her flower gardens, and her 8 to 10 foot tall sunflowers are the talk of the neighbourhood every summer. Marg and her spouse Bill are avid baseball fans, and strong supporters of the Toronto Blue Jays. Marg is still active in playing baseball and is a team member of the Mount Brydges Steelers Ladies Slo-Pitch baseball team.



New Monthly Newsletter – coming! Launching in early 2022!

We are excited to be launching a newly formatted monthly newsletter in early 2022!

We will be working with publishing partners such as The Wall Street Journal, Globe and Mail, Financial Post and many others to offer you free subscription content in a timely and reliable way!



Source: advisorstream.com

Today, more than ever we have recognized the importance of bringing as many references as possible to our clients. We also know our clients value knowing what is going on within the Flagstone Financial Group business, our four walls, and with our team!

With access to thousands of important and trustworthy articles, we will be able to confidently share in a simple but robust way, coupled with sharing important Flagstone and local news!

We are excited to launch and look forward to your feedback as we build this out in a meaningful way in 2022!

Happy New Year and all the best for a safe and healthy 2022! Let's remain hopeful that we can put COVID-19 behind us and enjoy all that life has to offer!

Thank you for an amazing 2021



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