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THINGS TO KNOW FOR

JUNE 2021



Client Online Portal

This portal is extremely user friendly and allows you to review your accounts at any time, including transactions, historical statements & rates of return. You can help to reduce the amount of paper produced each month by choosing online statements rather than paper statements!

Below is a quick review to help you set up your accounts:

- Step 1 Visit the [Online Portal](#) and click 'Register'
- Step 2 Answer some questions to verify your identity. Have your Client ID# handy
- Step 3 Choose your own access code and set up your security settings
- Step 4 Questions? Call 1-866-384-5840 or refer [Client Portal self-registration guide](#).

Note: Client ID is required which you can get directly from your Investment Statement or by calling the office at 519-245-7778. Please direct your inquiries to April in the office. Let us know what you think!



Annual Administration Billing – June 18 2021

This may apply to you!

You may soon see trustee fees being deducted from your investment account *(if they are applicable to you)*. Trustee fees are based on the holdings inside your portfolio and are paid to the investment dealer – iA Private Wealth.

In many cases, we have structured portfolios to reduce or eliminate these costs wherever possible. Accounts holding sufficient IA Clarington Funds or Dynamic Funds and accounts on the fee-based platform will not see these charges.

If you are unsure if trustee fees apply to you and you wish to review this information before the June 18 payment date, please contact our office at 519-245-7778 to speak with Lori or Brenda



Wealth Professional Awards 2021 – June 2/3

We have been selected as a **finalist** for the ***National Wealth Professional Awards 2021***

We were nominated in the category of **Engagement, Loyalty and Client Care**. Winners will be announced in early June! This specific award is being delivered by AGF Investments and the winner will be announced on June 3rd during the virtual event!

We are thrilled to be a finalist in this category as we take immense pride in delivering on this with every client, every time! We work hard every day to be worthy of your loyalty and trust!



Google Review



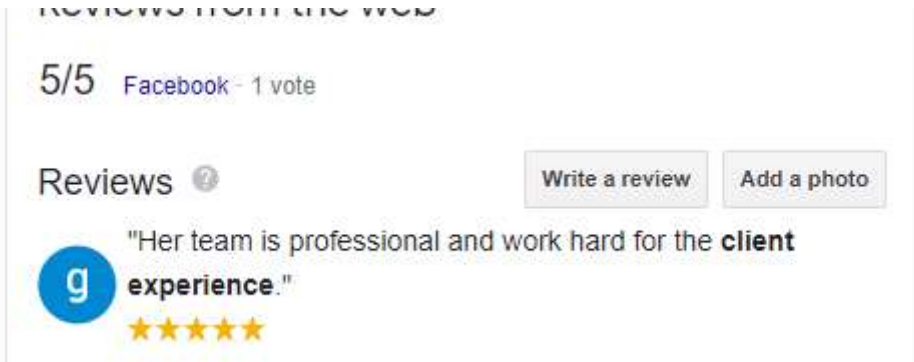
As we are all living in a world of technology, where social media plays an increasingly important role in our personal and business lives. We find that we are looking for more ways to become top of mind for potential clients who are seeking a proven process for financial planning and wealth management.

If you value the service we provide and feel that others could also benefit from our expertise, we invite you to rate us on a Google review - it just takes a few steps to provide us with this review.



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- 1) Our Flagstone Financial Group Inc. / iA Private Wealth website shows up on the right-hand side. From there, you will be able to “write a review”



- 2) Please write a quick note of your experience with us, what you like about the services and advice we provide and why you might recommend us to others

Thank you in advance for making the time to do this, as the more positive reviews we have, the higher our rating becomes when people are searching for financial planning offices in our area. It is one more way we can elevate our visibility on the web.



Community Corner

The Casual Athlete – “Fitness for the Rest of Us”

All inclusive, supportive and immersive recreational programs and MORE!



The Casual Athlete (TCA) is a group of services aimed to improve a person's mind, body and spirit. Beyond our variety of recreational programs, we offer mentorship, personal coaching, and even swimming lessons. By attending to all our clients personally, regardless of ability we are able to meet their most appropriate needs translating into strong customer loyalty for TCA.

We are 'Fitness for the Rest of Us' which means we help with how a 'Culture' change will address your fitness needs by utilizing a holistic approach. We are all more than just our physical self and each session starts with a "How are you today" discussion. 'Culture' s about the people in our community, the food we eat, the things we do, how we talk, etc. It is amazing how rapidly things can change if we can participate in a culture of wellness. We can then become our true selves.

With the introduction of Virtual Reality to our services this technology has provided a way to meet the needs of even our most vulnerable clients. What a game changer! We are able to offer remote sessions while still being able to see each other in a virtual space. TCA clients are able to box, play with lightsabers, climb mountains, while getting a heavy duty, hour long cardiovascular workout. By being immersed in virtual reality, a person very much lets go of their sense of fatigue or pain that often comes with heavy exercise. The effect it has had on people with injuries has been impressive, and we have first hand experience in seeing significant milestones in people who have otherwise been unable to function physically due to tramas or injuries. The personal experience, the positive impact to family and friends has such a ripple effect, as well as building hope for the future.

During COVID-19, and especially during lockdown the need for greater flexibility in what we do has heightened. TCA is unique given our blend of high and low technology tools and personalized coaching guided by Jungian psychology.

To move forward post pandemic, remotely attending to your clients will be absolutely key. Huge advances in virtual and augmented technology will revolutionize the way we can interact with other professionals and our clients.

Willingness to accept and adapt to how we approach our businesses and those who do will be carried forward as our world changes. We believe the time has come to leave some of our old practices behind and continue to look to be innovators in our community.

Greg Horton – Owner, The Casual Athlete

Visit us at: [facebook.com/TheCasualAthlete](https://www.facebook.com/TheCasualAthlete)

Or thecasualathlete@gmail.com

Summer Hours Are Back!



Beginning Monday May 31, 2021 through to Friday September 3, 2021
our office hours will be Monday to Thursday 8am to 5pm, and
Friday 8am to 12pm (noon). All other times by appointment.

If your inquiry is urgent, please contact either Lori at
lori@flagstonefinancialgroup.com or Joel at joel@flagstonefinancialgroup.com



This information has been prepared by Brenda Meulendyks & Lori Van Geffen whom are Investment Advisors for iA Private Wealth® and does not necessarily reflect the opinion of iA Private Wealth. The information contained in this newsletter comes from sources we believe reliable, but we cannot guarantee its accuracy or reliability. The opinions expressed are based on an analysis and interpretation dating from the date of publication and are subject to change without notice. Furthermore, they do not constitute an offer or solicitation to buy or sell any of the securities mentioned. The information contained herein may not apply to all types of investors. The Investment Advisors can open accounts only in the provinces in which they are registered.

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Insurance products and services are offered through Flagstone Financial Group Inc., an independent and separate company from iA Private Wealth Inc. Only products and services offered through iA Private Wealth Inc. are covered by the Canadian Investor Protection Fund.

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