

What's on Your Mind?

August 2017

The Only Constant is Change, iA takes over HollisWealth

Change goes on daily in our lives. If you have been a client of mine for any length of time you know that there are always changes going on here. Having been at Kennedy Road for over 21 years, we have had our share of changes including company mergers. As of end of day August 4th, Scotia Capital Inc. will no longer own HollisWealth. Our new owners and hopefully the last merger for a while, will be Industrial Alliance Financial Group. iA for short. Going through transitions over the years you realize that it is just business as usual.

While in the past we have had new email addresses and even company name changes I want to tell you that this time there will be no changes or disruption to the emails or to the HollisWealth name.

iA is a Canadian company founded in 1832. While many of you may not know this company, they are huge in Quebec and secondly in Ontario. This company was known more for its insurance products than investment products. Having said this, they have access to all investment products you have come to know. iA is a company wanting to expand the investment side of their company and have been recently buying up a lot of independent advisory firms. HollisWealth was a company iA really wanted to acquire because of our independent advice and representation right across the country.

New account numbers will be assigned to you because iA operates different back office systems. The impact to you is when you want to do your online deposits. After August 4th, you will need to enter your new account number under HollisWealth. You can always contact our office if you need any assistance. For those of you viewing your accounts on-line, you will be getting new access codes. The online experience will be enhanced for those of you that care to explore. iA will be sending out a new administrative fee schedule in August.

We will be calling or emailing our calendar to start booking appointments from mid-August on to start updating your existing accounts over to iA. In the meantime, once you have your new access codes you can view and make your online deposits as usual. Everything will remain the same.

If you have any questions regarding the transition over to the new owners you can call and discuss with any of our team. Enjoy the rest of your summer and we will see and talk to you soon.

Linda J. Levesque, CFP®, FMA, FCSI®
Sr. Investment Advisor
Director, Private Client Group
HollisWealth Insurance Advisor
HollisWealth Insurance Agency Ltd.
Levesque Wealth Planning
HollisWealth, a division of Scotia Capital Inc.
One Corporate Plaza, 2075 Kennedy Road, 5th Floor, Toronto, ON M1T 3V3
Tel: 416-412-8018 / 1-800-322-4030 Fax: 416-332-6772
linda@levesquewealthplanning.com



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You can, as long as you include this complete statement with it: Linda J. Levesque, Senior Investment Advisor and Director, Private Client Group of HollisWealth is an author of The 5 Minute Wealth Plan, Saving Today for a Richer Tomorrow, in The Road to Success with Jack Canfield and in The Authorities, Powerful Wisdom from Leaders in the Field. If you're ready to jump-start your life, have more fun and joy in all that you do, get a FREE consultation from Linda J. Levesque

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