

A large, stylized question mark graphic is positioned on the left side of the slide, composed of three concentric circles in varying shades of blue.

# CFO on the GO

Brought to you by the Whack Hack®



# The Whack Hack

We're a group of diverse and specialized individuals with a common goal of designing and launching a high potential prototype.

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This group is about challenging the status quo and thinking bigger.

Our mission is to inspire financial confidence in a client who isn't always comfortable asking an advisor basic financial questions.

# ARE YOU READY?

...to disrupt the industry?

...to become an industry leader?

...to create an exceptional client experience?

# Introducing your personal CFO on the GO

Your Living Plan™  
doesn't work 9 to 5,  
so why should your advice?

CFO on the GO enhances your relationship with your Advisor, by providing personalized financial advice that augments your financial plan wherever you are, whenever you need it – 24/7.



# Setting the stage.

1

Extension of the IG Wealth app that is launching in 2019

2

Connects to the Living Plan™ to provide customized financial advice that supplements the client's financial plan

3

Does not replace the advisor, but enhances the client to advisor relationship

"86% of survey respondents (HNW & MA) indicated they'd be receptive to basic automated financial planning" – DELOITTE



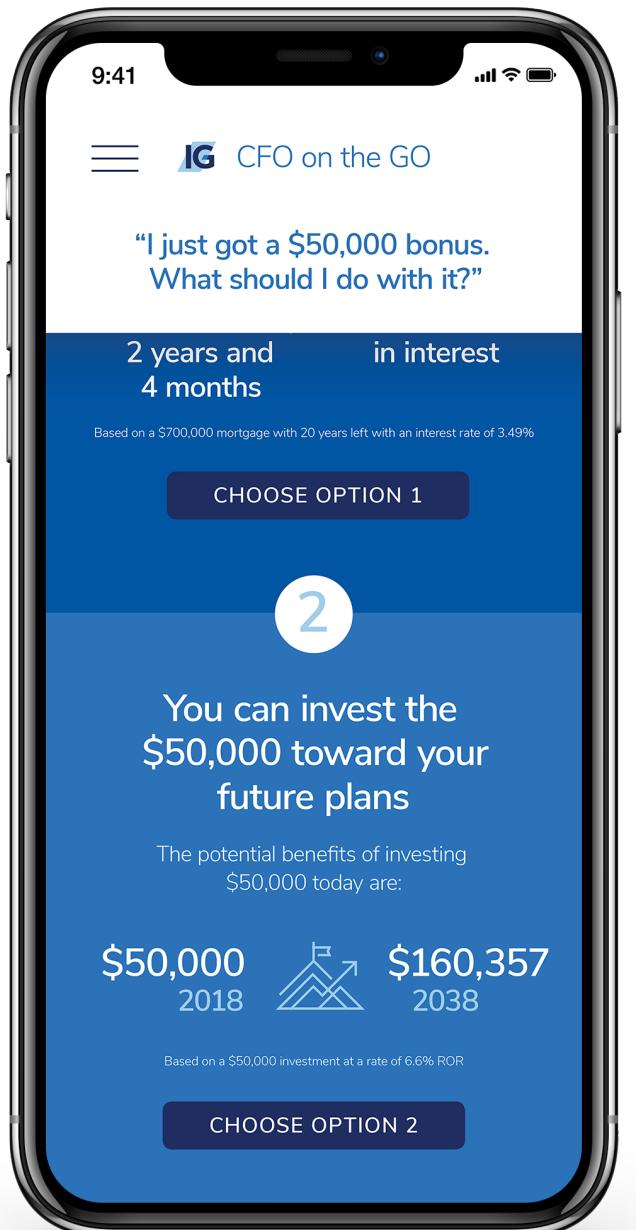
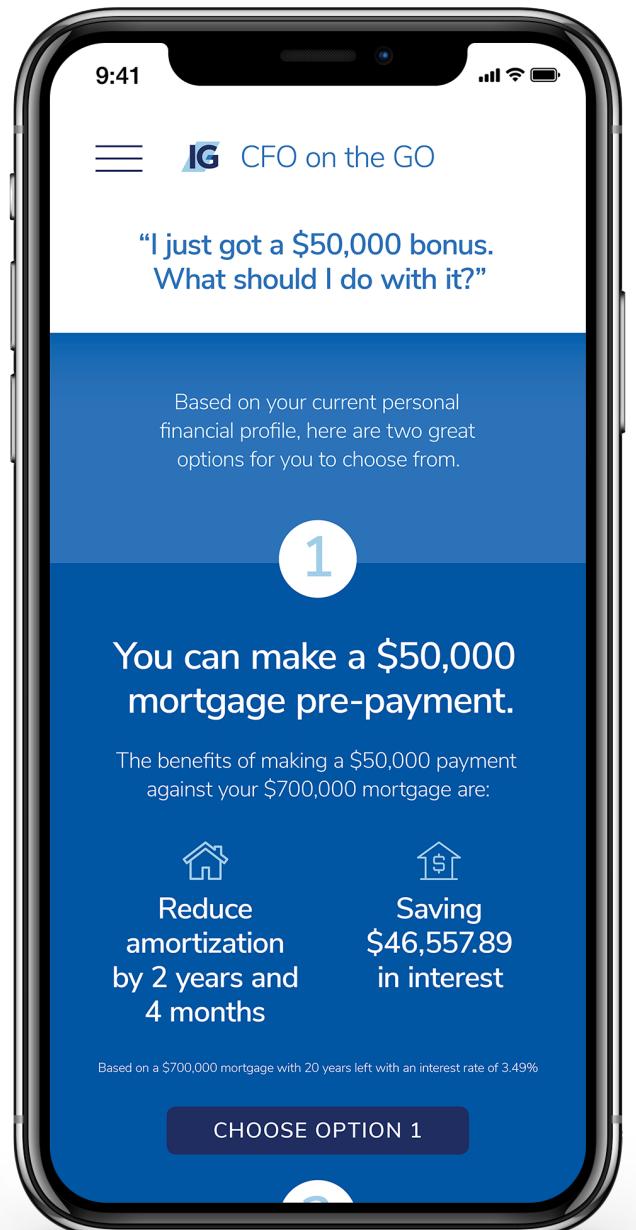
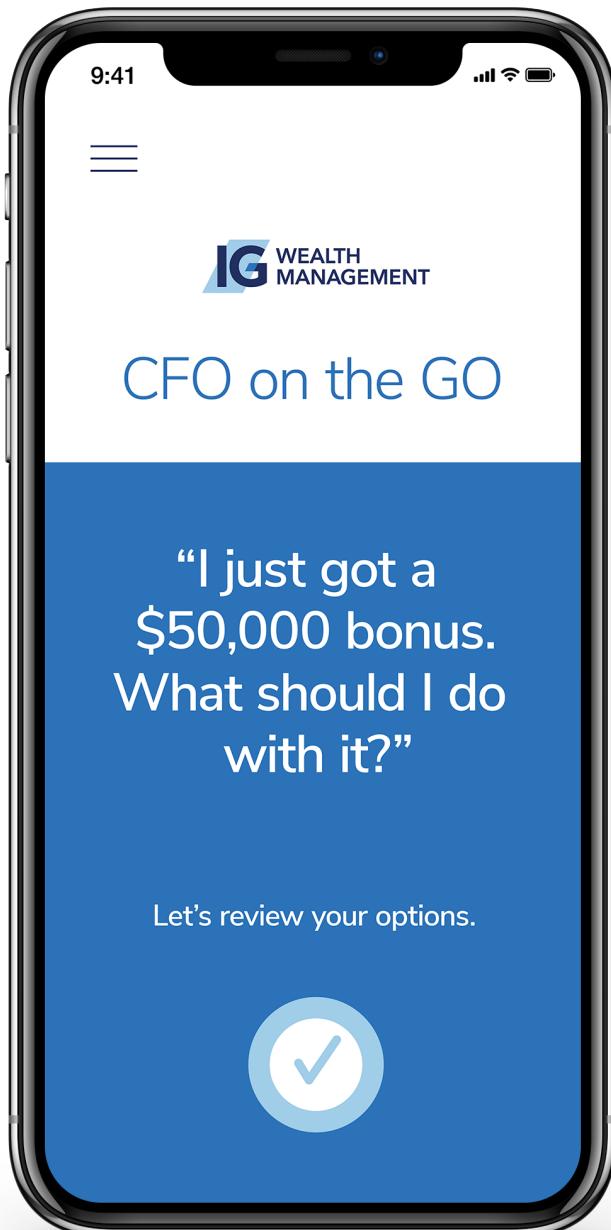
# CFO on the GO

An extension of  
your existing IG  
app (coming soon)

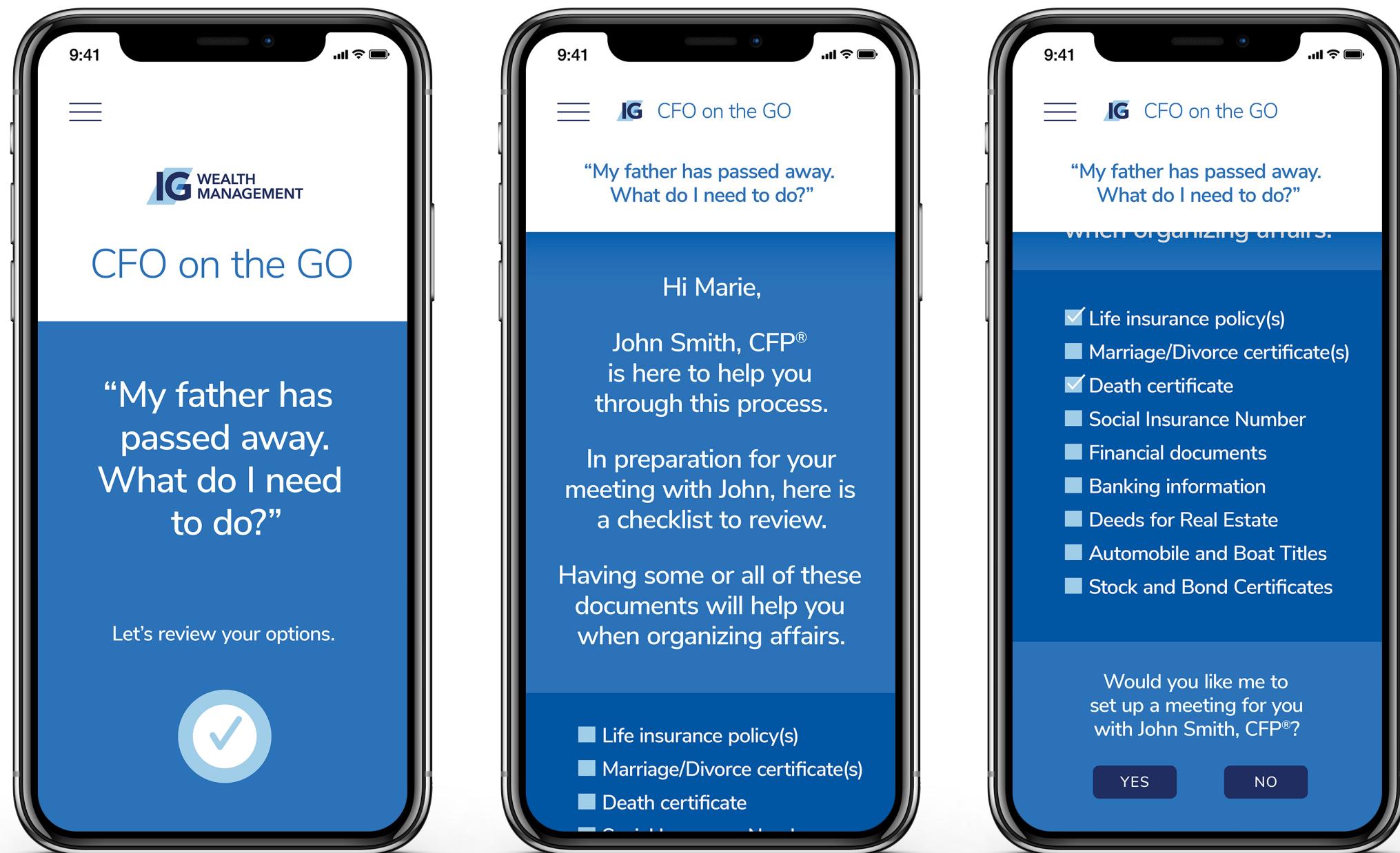
POWERED BY



# Question 1: A windfall scenario



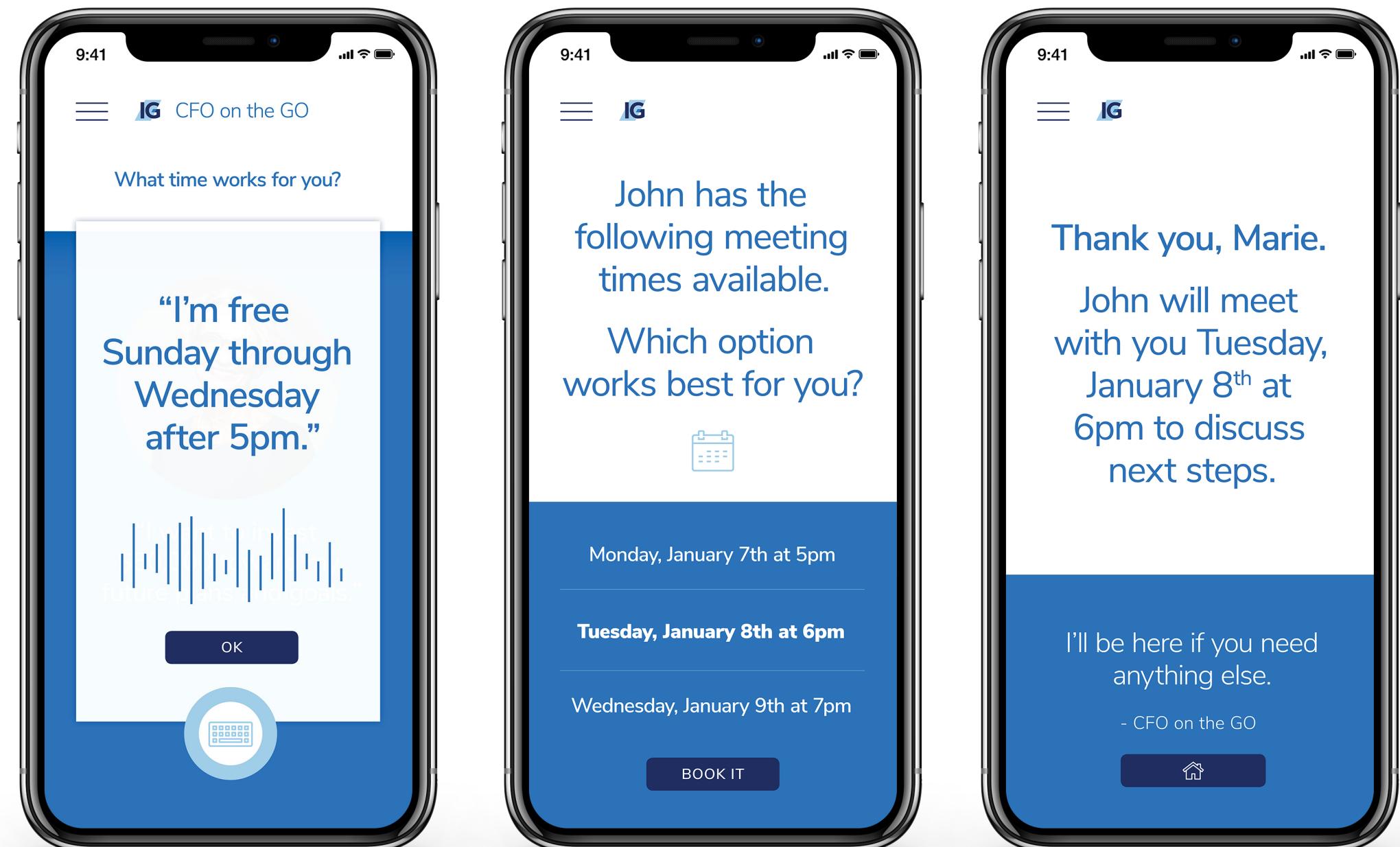
# Question 2: Life event



# Creating client to advisor connections

“Google Voice search queries have significantly increased since inception and Google is predicting 50% of all search queries will be voice by 2020 indicating strong consumer shift”

Google



# Strategic alignment

1

Our promise:  
We inspire financial confidence

CFO on the GO promises to be always present to support our client's ever changing financial lives

2

Our value proposition: Better Gamma

Providing personalized financial advice 24/7 that augments your Living Plan™, providing industry leading gamma

3

Superior advice

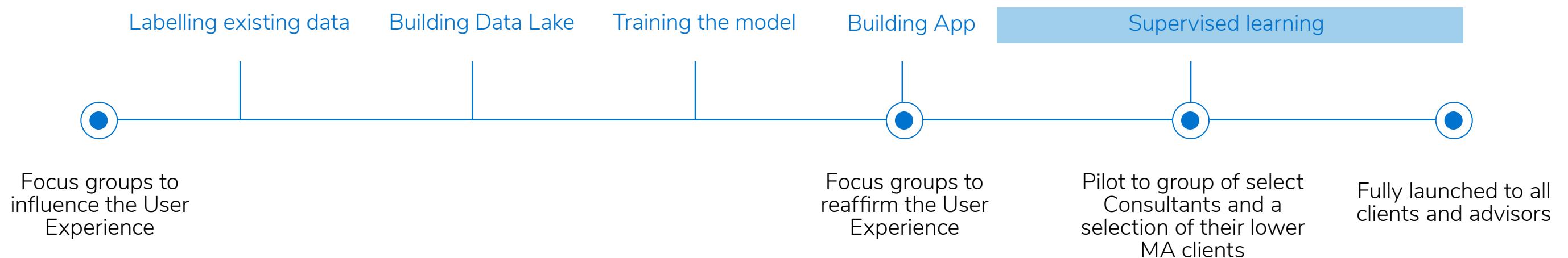
Empowers clients to ask questions; providing IG Wealth with a deeper knowledge of our clients to deliver a superior experience

4

Business processes that are simple, easy and digitized

Using industry leading technology we will reduce the timeline from question to action

- 1 18 months from focus groups to go to market
- 2 \$50k - \$100k in development costs
- 3 Increased share of wallet by 5% among HNW & MA translating to an additional \$12B in AUM



# Speeding up client satisfaction

## Current process

Question to action = 2-4 weeks DEPENDING ON AVAILABILITY



## CFO on the GO

Question to action = 4 days DEPENDING ON AVAILABILITY



# CFO on the GO

## Consumer:

Access to world class financial advice  
24 hours a day, 7 days a week

## Consultant:

Increased productivity and builds stronger client relationships with enhanced client communication

## IG Wealth Management:

Increases client share of wallet, increased productivity and a consistent brand across the country

Any questions?

