

# Investor Event 2025

## Event Details

Date: 2025-02-24

Company: iA Financial Corp., Inc.

Ticker: IAG

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## Company Participants

**Caroline Drouin** - iA Financial Corp., Inc., Head-Investor Relations

**Denis Ricard** - iA Financial Corp., Inc., President, Chief Executive Officer & Director

**Éric Jobin** - iA Financial Corp., Inc., Chief Financial Officer, Chief Actuary & Executive Vice-President

**Pierre C. Miron** - iA Financial Corp., Inc., Executive Vice-President & Chief Growth Officer-Canadian Operations

**Renée Laflamme** - iA Financial Corp., Inc., Executive Vice-President-Individual Insurance, Savings and Retirement

**Stephan Bourbonnais** - iA Financial Corp., Inc., Executive Vice President-Wealth Management

**Sean O'Brien** - iA Financial Corp., Inc., Executive Vice President & Chief Growth Officer-US Operations

**Joe Dunlap** - iA Financial Corp., Inc., President-iA American Life & American-Amicable Group of Companies

**Melissa Balsan** - iA Financial Corp., Inc., President & Chief Operating Officer-iA Financial, Executive Vice President & Chief Marketing Officer-Fidelity Life

**John Laudenslager** - iA Financial Corp., Inc., President-iA American Warranty Group

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## Other Participants

**Lemar Persaud** – Cormark Securities – Analyst

**Paul Holden** – CIBC Capital Markets – Analyst

**Meny Grauman** – Scotia Capital – Analyst

**Tom MacKinnon** – BMO Capital Markets – Analyst

**Gabriel Dechaine** – National Bank Financial – Analyst

**Doug Young** – Desjardins Capital Markets – Analyst

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## **EVENT DISCUSSION SECTION**

### **Caroline Drouin**

Alright. Good morning. Bonjour tout le monde. On behalf of IA Financial, it's a real pleasure to welcome you to our 2025 investor event. My name is Caroline Drouin. I am the head of investor relations at IA. A few words on me. I am proud to have been working for IA for six years, a little over six years now, and I just recently transitioned into, this role in leading the investor relations team. Coming from an actuarial background, I can tell you I've had, the opportunity to take on different, leadership roles. And I can tell you that this is by far the most exciting, the most dynamic, transition that I've had.

So it's wonderful to see you all here. This is our first in-person event since 2018. So, the whole senior management team is, excited to have the opportunity to connect with you in beautiful Toronto today. And for those of you joining us online, a warm welcome. I'm going to quickly, hit on a few, housekeeping items.

So behind me, you can see the agenda. So we're going to kick off the day with, an intro, from our president and CEO, Denis Ricard. It will then be followed by our, financial outlook presentation from our CFO. We have a great lineup of presenters also. We're going to then switch over and focus on the Canadian operations, and this Canadian panel will be followed by a Q&A session.

And then we'll take a short break around midday. We'll reconvene after, and then we'll do a deep dive on our US operations. And this session too will be followed by a Q&A. We will be wrapping at around noon with closing remarks from our president and CEO. And for those of you attending, in person, we invite you to stay with us for a networking lunch. The whole senior management team is here today, so this will be a great opportunity for you to meet with them and connect with them.

Now before we start, I do need to turn your attention, to the next slide, this slide. So our comments today will include forward-looking statements, that are based on material assumptions with risks and uncertainties, all of which are covered in our documents. And actual results may differ, so we encourage you to review our disclaimers. We also draw your attention to this slide and the notes on the non-IFRS financial measures, which are included in today's material. Finally, all of our presentations, all of our videos and transcripts will be posted on our website under the investor relations section.

So with that, please welcome to this stage our president and CEO, Denis Ricard.