



Qualification period
24 months: January 1, 2023, to December 31, 2024

Qualification Criteria – ADVISORS

Career and Dedicated Networks

Mexico | Spring 2025

To qualify, advisors must meet the following requirements:

Requirements	Elite qualification	First-Class qualification
Total production	285,000	TOP 35 AND Minimum 500,000

The definition of **total production** is as set out in the Career and Dedicated Network Advisor Compensation Schedule.

Total production may be consulted via the Production monitoring function in the Compensation application, in the Advisor Centre. The official results and ranking are those of the **Rendezvous iA** microsite at ia.ca/rendezvous.

Corporations with multiple advisors

In the case of a corporate contract that includes more than one advisor, the corporation can qualify by multiplying the total production requirements by the number of advisors in the corporation. For example, for a corporation with 2 advisors, it will have an Elite level requirement set at 570,000 (2 x 285,000) and a 1st class level requirement set at 1,000,000 (2 x 500,000) of total production.

If the corporation's total production **is less than** the set requirement, **no** advisor will be qualified.

If the corporation's total production **is greater than** the set requirement, all eligible advisors of the corporation will be qualified. The **advisor's rank** will be determined by their **personal total production within the corporation**.

If the corporation meets the **First-Class** requirements, the advisor's rank will determine the level of invitation they will receive.

Eligibility

All advisors from the Career or Dedicated Network who have a contract in good standing with Industrial Alliance Insurance and Financial Services Inc. (the “Company”) during the qualification period and at the time of the Rendezvous iA are eligible.

No proportional qualification will be granted to: advisors or corporations who are placed under contract, advisors who have had a period of absence (disability, illness, maternity, paternity, parental, etc.) and to managers who return to the sale, during the qualification period.

Attendance at the Rendezvous iA by the advisor and an adult companion of at least 18 years of age is by invitation only and not under any contractual right.

To be eligible, the fair treatment of consumers must be an essential component of the advisor’s practice. The advisor must not act in his own interest and must ensure that he offers clients products that suit their financial situation and needs. The advisor’s licence must not have been suspended, revoked or subject to restrictions by, nor should accusations be made against the advisor by a regulatory or self-regulatory authority or by the Company. When determining the advisor’s eligibility, his business quality shall be assessed by the Company, which retains the right, so long as the event has not been held, to disqualify any advisor who does not meet its quality standards.

Moreover, the advisor must be the only person to submit policies under his personal code. Pooling is not permitted. Furthermore, Rendezvous iA credits may not be transferred between advisors. If an advisor moves to another agency during the qualification period, the credits earned at both agencies shall be used to calculate total production.

Qualification period

The qualification period runs from January 1, 2023 to December 31, 2024. The total production as of December 31, 2024 will be used to qualify all advisors.

Case Review

No case review request can be submitted. Case review request will be declined automatically. The final total production used will be the one indicated on the last report of the qualification period, i.e. report dated of December 31, 2024.

Other conditions

The invitation to the Rendezvous iA must be accepted as is. Substitute awards or cash exchanges are not possible.

The Company is responsible for making all final decisions regarding the Rendezvous iA.

Where there is a discrepancy between the information provided in this document and promotional documentation provided during the qualification period, this document shall take precedence.

After the event, the Company will issue tax slips for attendees and their guests in the name of the attendee under contract with the Company. The taxable amount will be based on the actual costs incurred by the Company for these activities, in accordance with the tax laws then in effect.