



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

Qualification Criteria – Operating firm

Dedicated Network

Mexico | Spring 2025

The Operating firm Elite qualification criteria is based on the number of qualified advisors to the Rendezvous iA in the agency at the end of the qualification period. To qualify, the Operating firm must meet the following requirements:

Requirements	Elite qualification	First-Class qualification
Number of invitations	Qualified advisors	TOP 3
1	5	3 first BM ¹ or Operating firms ranked in Elite qualification
2	10	
3	15	
4	20	

¹The **TOP 3** can be made up of Branch managers (BM) from the Career network as well as Operating firms from the Dedicated network.

An Operating firm can receive up to a maximum of 4 invitations to the Rendezvous iA **Elite Level** and only 1 invitation for the **First-Class Level** if all requirements of each level are met. The owner of the Operating firm will be responsible to select which members of the management team will represent their agency, subject to the Company’s approval.

The **TOP 3** ranking is determined by the addition of **gross recruitment** and **net growth**, subject to a minimum **weekly average** of 875. In the event of a tie, the Branch Manager or Operating firm with the best weekly average will win the tiebreaker.

Gross recruitment corresponds to the number of advisors placed under contract at the agency during the qualification period. Attributions do not count in the calculation for gross recruitment.

Net growth corresponds to the increase in the number of regular producers within the agency. It is measured based on the number of regular producers at the agency, based on the reference index, as of January 1, 2023.

Transfers of regular producers between agencies do not count towards net growth objectives. The calculation basis is increased for the agency gaining the regular producer and reduced for the agency losing said producer.

The **weekly average** is calculated based on the total production of eligible advisors, meaning those who meet the following criteria:

- a) Have less than 5 years of experience with the company at the beginning of the qualification period and placed under contract with no prior experience, or
- b) Placed under contract during the qualification period and have no prior experience in the industry.

To calculate this average, the total production of eligible advisors is divided by the total number of weeks during which each of them was under contract with the company, minus any weeks during which eligible advisors were absent and excluding the waiting periods (illness, paternity, maternity, etc.) during the qualification period.

The definition of total production is as set out in the 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.

Eligibility

All Operating firms from the 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 to qualify.

Attendance at the Rendezvous iA by a representative of the management team 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 Operating firm's practise. The Operating firm must not act in its own interest and must ensure that it offers clients products that suit their financial situation and needs and must be assured, in a reasonable manner, that the members of its agency act in the same way. The Operating firm's licence must not have been suspended, revoked or subject to restrictions by, nor should accusations be made against the Operating firm by a regulatory or self-regulatory authority or by the Company. When determining the Operating firm's eligibility, its business quality shall be assessed by the Company, which retains the right, so long as the event has not been held, to disqualify any branch manager who does not meet its quality standards

There will be no prorating of the Rendezvous iA requirements for people who contract with the Company during the qualification period.

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.

Only applicants, without experience in the industry, who will have completed the contracting process **no later than December 31, 2024** will be considered for qualification for the Rendezvous iA for managers. **No exception can be granted.**

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, that has been selected by the Operating firm to participate to the event. 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.