

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

Qualification Criteria – SALES MANAGERS (SM) AND ASSISTANT SALES MANAGERS

Career Network

Mexico | Spring 2025

To qualify, sales managers must meet the following criteria:

Requirements	Elite qualification			First-Class qualification
SMs and Assistant SMs	Gross recruitment	Net growth	Weekly average	TOP 6
SM with no assistant	8	3 ¹	1025	6 first SM ranked in Elite qualification
SM with 1 assistant	16 ²	6 ²		

- ¹ For Elite qualification, the net growth criterion is reduced to 2 for sales managers who have 11 regular producers reporting to them and to 1 for sales managers who have 12 or more regular producers reporting to them as of January 1, 2023.
- ² For teams with a sales manager and at least one assistant sales manager, the gross recruitment and net growth objectives are adjusted in proportion to the number of weeks the team was made up of a sales manager and at least one assistant. The criteria are also adjusted according to the number of assistants who are matched to him. If the SM meets the criteria, his assistant(s) who meet the eligibility requirements will receive an invitation of the same level as the SM.

Sales managers can **qualify automatically to the Elite level if at least 5 advisors from their team qualify** for the Rendezvous iA, regardless of level (excluding the sales manager and their assistant sales managers). **An assistant sales manager may not receive an invitation under this criterion.**

The **TOP 6** ranking is determined by the addition of gross recruitment and net growth. In the event of a tie, the SM with the best weekly average will win the tiebreaker. For teams with a sales manager and at least one assistant SM, the addition of the gross recruitment and net growth objectives are divided by the number of assistant SM in proportion of the duration of the agreement, + 1 to also consider the SM in the calculation. A SM ranking in the TOP 6 with his assistant will occupy two of the six places available at the 1st Class level. If the positioning of the SM does not allow all his assistants to rank in the TOP 6, it will be the one or those who have had the longest duration of agreement during the qualification period who will be invited in 1st class. Assistants unable to access 1st class due to the positioning of the SM in the TOP 6 will receive an invitation to the Elite level.

Gross recruitment corresponds to the number of advisors placed under contract in the team 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 team. It is measured by taking into consideration the number of regular producers in the team, based on the reference index as of January 1, 2023. If a sales manager is appointed during the qualification period, the benchmark index corresponds to the number of regular producers at the date of the appointment.

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

If an advisor is promoted during the qualification period and this promotion results in the loss of a regular producer for the sales manager, the initial number of regular producers will be adjusted to not penalize the sales manager.

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.

For a SM with at least one assistant, the weekly average is the only criterion that is not pro rated according to the number of managers in the team.

The definition of total production is as set out in the Career 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 ja.ca/rendezvous.

Advisors promoted to assistant sales manager or sales manager

If, as of January 1, 2024, an advisor becomes a sales manager, branch manager or assistant sales manager, he may receive an invitation to participate to the Rendezvous iA Elite level if, on the date of his appointment, he was qualified on a pro rata basis to the advisor requirements.

In all other cases, the promoted advisor must meet the requirements set for sales managers for the team assigned to him.

The baseline for assessing the net growth requirement is the number of regular producers on the team at the time of appointment, and the promoted advisor must achieve all other criteria, without pro-rating.

Eligibility

All managers from the Career 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 the sales manager or assistant sales manager 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 sales manager’s or the assistant sales manager’s practice. The sales manager or assistant sales manager must not act in his own interest and must ensure that he offers clients products that suit their financial situation and needs and must be assured, in a reasonable manner, that the members of his team act in the same way. The sales manager’s or the assistant sales manager’s licence must not have been suspended, revoked or subject to restrictions by, nor should accusations be made against the sales manager or the assistant sales manager by a regulatory or self-regulatory authority or by the Company. When determining the sales manager’s or the assistant sales manager’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 sales manager or assistant sales 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.

To receive an invitation, assistant sales managers must occupy their position at the end of the qualification period and have occupied their position for at least one year.

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 whose AMF exam scores are received **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. 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.