

A high-angle, close-up photograph of several business professionals in dark suits and light shirts, focused on reviewing documents on a desk. Their hands are visible, pointing and holding papers. The background is softly blurred, emphasizing the collaborative work environment.

# Great CA careers start at Investors Group

INVESTORS GROUP'S CHARTERED ACCOUNTANT (CA) TRAINING PROGRAM



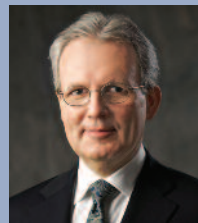
If you're pursuing your Chartered Accountant (CA) designation and would like to work at a company where there's variety in what you do, offers the prospect for employment after your training program and values a good work-life balance, we invite you to consider Investors Group.

Investors Group is a Canadian leader in providing personal financial planning services. We are one of only three companies in Manitoba outside the traditional CA firms to be approved by the Institute of Chartered Accountants of Manitoba (ICAM) as a CA training office.

You can build your knowledge and skills working at our head office, located right here in Winnipeg. Our program gives you the opportunity to work in several different areas of the company, which provides you with a well-rounded range of experience. It's a great place to both start your career as a Chartered Accountant, and grow that career over time.

Our many CAs at Investors Group will tell you, this may be the best career move you'll ever make.

We hope you will join us!



**Murray Taylor**  
President and  
Chief Executive Officer



**Gregory Tretiak, CA**  
Executive Vice-President  
and Chief Financial Officer



## About us

Investors Group is a Canadian leader in providing personal financial planning services, and is dedicated to building lasting client relationships.

Investors Group is a member of the Power Financial Corporation group of companies with \$59.4 billion in mutual fund assets under management at August 31, 2011. We deliver personalized financial solutions to more than one million Canadians through over 4,500 Consultants across the country.

For more than 80 years, Investors Group has helped Canadians build long-term financial security. In addition to an exclusive family of mutual funds and other investment vehicles, Investors Group offers a wide range of insurance, securities, mortgage and other financial services.

Visit [www.investorsgroup.com](http://www.investorsgroup.com) for more information.

## Our Chartered Accountant Training Program

The Canadian Chartered Accountant (CA) profession has expanded its training opportunities to appeal to a new generation of students and showcase the different types of work being done by CAs. This gives you the option to meet your practical experience requirements at a corporation or public sector organization, instead of a traditional public accounting firm.

### Looking for a non-traditional experience?

Investors Group is one of three corporations in Manitoba outside the traditional CA firms that has been approved by the Institute of the Chartered Accountants of Manitoba (ICAM) as a CA training office.

Working out of the Investors Group head office at One Canada Centre in Winnipeg, we offer you a career path where you can build your knowledge and skills in the financial services industry.

Our CA training program gives you the benefit of establishing your career path early, and continuing your employment at Investors Group once you complete your training and receive your CA designation.

We offer a great working environment and encourage a healthy balance between your work and your life outside of work.

### Looking for variety?

Our CA training program gives you a variety of practical experiences through career path rotations in different company areas. This helps you to fully develop your CA and other business competencies while providing valuable knowledge and experience in the financial services industry, including mutual funds, insurance, securities, mortgages and other financial services that we offer.

Each training period includes rotations in a combination of some of the following areas\*:

- Internal Audit
- Internal Controls
- Financial Reporting
- Corporate Taxation
- Sales Compliance
- Advanced Financial Planning
- Mortgage Financial Services

### Educational Support

Consistent with public accounting firms and government employers, we are dedicated to ensuring you are successful in completing your Chartered Accountant School of Business (CASB) modules and the Uniform Final Exam (UFE). We offer a comprehensive CASB and UFE support program which includes mentorship as well as technical and case writing sessions.

\*Other rotations are currently under consideration.

## Here's what some of our CAs say about Investors Group

In the short term you want to make it through the UFE. In the long term you want a rewarding career that keeps you interested, stretches and grows you. At Investors Group we answer both of these demands. My career with Investors Group has provided me with leadership opportunities and exposure to a range of disciplines: from traditional internal audit responsibilities right through to sales team leadership and marketing (yes, a CA in charge of marketing!), long-term corporate strategy formation, human resource management, along with the design, development and implementation of new products and training programs. Non-traditional – yes. Interesting and challenging – absolutely!

**Kevin Regan, FCA, Executive Vice-President, Financial Services**

As a former tax partner specializing in tax and estate planning, I joined the Advanced Financial Planning team at Investors Group at a time in my life when I needed better work life balance to devote the time I needed to my one year old daughter. Later on, when my daughter was older, I was asked to assume responsibility for I.G. Insurance Services Inc. This was an incredibly energizing opportunity to use my CA skills in a new way, being responsible for all of the facets of an entire company within Investors Group. Investors

Group really supports giving back to the community and your profession and has allowed me to further develop my experience by serving on the Council of the Institute of Chartered Accountants of Manitoba. I would say that the opportunities for a CA student at Investors Group are unlimited!

**Heather Clarke, FCA, Vice-President, I.G. Insurance Services Inc. and Past President of The Institute of Chartered Accountants of Manitoba (2008-2009)**

Investors Group has offered me a wealth of opportunities to take advantage of my professional foundation, while continually building stronger skills. I started my career as an internal auditor, and have moved through positions in accounting, distribution (sales), client service operations, branch operations & facilities, and have also been involved in I.T. development projects. Currently, I am Chief Compliance Officer for our mutual fund dealer and investment dealer, a position that draws on the broad experience I have been able to accumulate from the diversity of roles available with Investors Group. My advice to new CA students would be to seriously think about the potential for broader skill development in the context of a firm such as ours.

**Pat Kloepfer, CA, Vice-President, Compliance Officer**

## CAs working at Investors Group

Throughout our 80 year history, we have provided opportunities to CAs in a variety of positions. Currently CAs at Investors Group are employed in the following roles:

### Finance

Executive Vice-President and Chief Financial Officer

### Financial Reporting

Vice-President  
Assistant Vice-President  
Manager  
Assistant Manager

### Internal Controls

Assistant Vice-President  
Manager

### Internal Audit

Manager

### Corporate Taxation

Vice-President  
Assistant Vice-President  
Director  
Manager

### Funds Services

Vice-President  
Manager

### Financial Services

Executive Vice-President

### Compliance

Vice-President

### Advanced Financial Planning

Director, Tax & Estate Planning  
Senior Tax & Estate Planning Specialist

### Insurance

Vice-President, Investors Group Insurance Inc.

### I.G. Investment Management, Ltd.

Vice-President, Portfolio Manager,  
Head of Fixed Income



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[www.investorsgroup.com](http://www.investorsgroup.com)

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