

## Pre-work – checklist

Before you start the form, please ensure you have completed each of the following:

### Write your Unique Value Proposition (UVP)

Consider what clients value about your practice and how they might describe what you have achieved together. Your VP or RVP and the PWM brand marketing team ([Chris.Greenhalgh@ig.ca](mailto:Chris.Greenhalgh@ig.ca) or [Troy.Fullerton@ig.ca](mailto:Troy.Fullerton@ig.ca)) can help you through this exercise.

### Take new/gather existing hi-resolution headshots and team photos

If you have existing photos, you will need to include these in your submission of the intake form.

If you don't have photos, you can connect with the PWM brand marketing team for guidance, samples, and best practices. You should also review the [brand guidelines](#) with your photographer.

### Collect client testimonials

Testimonials are common practice and help add credibility to your practice. You should aim for 3–5 testimonials and clients should be made aware that their testimonials are appearing on your website. Aim for 3–4 sentences max per testimonial.

### Review other Consultant sites on the Advisor Websites platform

The websites and cap deck are largely templated with pre-approved copy. In reviewing other Consultant websites, you will get a sense of what is customized and what is pre-approved. We recommend you review these three best-in-class websites:

- a. [Vassalo & Associates](#) (PWM – Customized)
- b. [Gaylor Tachauer & Associates](#) (PWM – Customized)
- c. [Sandra Ramos & Associates](#) (PWM – Personalized)
- d. [Hopkins, Pope & Associates](#) (WM – Personalized)

## Contact information for lead Consultant

1. Name:
2. Consultant number:
3. Approved trade name (if applicable):
4. Phone number(s):
5. Address, including postal code:
6. Main email displayed across the website:
7. Email for all lead generation form submissions, including meeting bookings, if different than above:
8. MS Bookings calendar URL, if applicable (the calendar will appear on your site in lieu of a meeting request form, [sample](#)):

## Dealer name

[Outside Québec]: IG Wealth Management Inc. *Mutual Fund Division*

[Outside Québec]: IG Wealth Management Inc.

[Inside Québec]: IG Wealth Management Inc., Firm in Financial Planning *Mutual Fund Division*

[Inside Québec]: IG Wealth Management Inc., Firm in Financial Planning

## Approved social media accounts

1. LinkedIn:
2. Facebook:
3. X (formerly Twitter):
4. Instagram:
5. YouTube:
6. Other:

## Other

1. Year you began providing wealth management services:
2. Existing website URL, if applicable:
3. IG Living Plan snapshot unique referral URL ([create your URL here](#)):
4. Organizations/initiatives you support, if applicable (if you want to include logos, reach out to each organization to request a hi-resolution version and approval to post their logo on your site, and include each as an attachment when you submit this form):
5. Media coverage, if applicable (add links to any articles about you or your practice):

# Unique Value Proposition (UVP)

Copy your UVP into the appropriate field below or update the variables and use the pre-approved version. Recommended word count: 200

PWM UVP

WM UVP

## Team bios

### TEAM MEMBER 1

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

### TEAM MEMBER 2

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

### TEAM MEMBER 3

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

### TEAM MEMBER 4

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 5**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 6**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 7**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 8**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 9**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 10**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 11**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

**TEAM MEMBER 12**

Name:

Title:

Designations:

Biography (recommended word count: 200):

Quote (if desired):

LinkedIn profile URL (if desired):

## Client segments

Select all that apply and rank from **most** to **least** relevant to your practice, 1 being **most** relevant. Your ranking will dictate which homepage headlines and photos we use on your site (you can update these selections during development reviews).

- Pre-retirees and Retirees
- Business owners and entrepreneurs
- Healthcare professionals
- Executives
- Families
- Agriculture and farming families
- Women, Wealth & Well-being
- Specify other:
  
- No preferred ranking

## Solutions

Select all that apply and rank from **most** to **least** relevant to your practice, 1 being **most** relevant. Your ranking will dictate which headlines and photos we use on your site (you can update these selections during development reviews).

- Investment planning
- Retirement planning
- Tax planning
- Insurance planning
- Mortgages and cashflow planning
- Estate and legacy planning
- Charitable giving
- Business succession planning
- IG Private Company Advisory
  
- No preferred ranking

## AdvisorStream integration (if applicable)

**Newsletter Subscribe button:** AdvisorStream allows you to embed a newsletter sign-up form on your website. [Configure the form through AdvisorStream](#) and then copy the form embed code below.

**Newsfeed:** AdvisorStream also allows you to share 3<sup>rd</sup> party content directly to your website. [Set this up through AdvisorStream](#) and then copy the news feed embed code below.

## Videos

If you created your own video content, got marketing compliance approval, and have your videos uploaded to an approved YouTube channel, include the video links to each video you want on your site:

### Client testimonial videos

If you have approved testimonial videos you would like on your site, enter the YouTube video links:

## Client testimonials

Use first name and last initial only (you may also indicate how long they've been a client and/or their profession). Recommended word count: 150

TESTIMONIAL 1

TESTIMONIAL 2

TESTIMONIAL 3

TESTIMONIAL 4

TESTIMONIAL 5