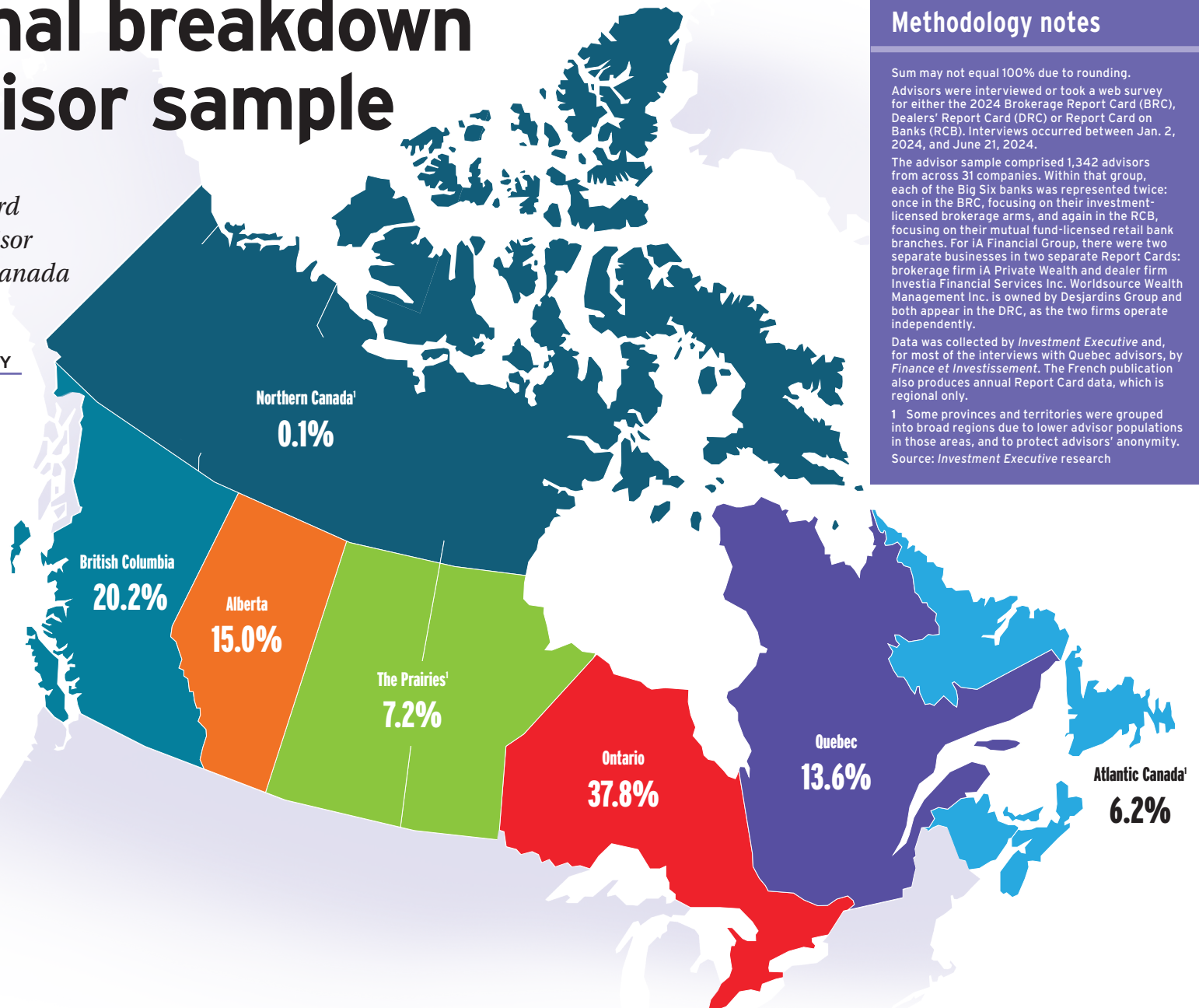


Regional breakdown of advisor sample

The 2024 Report Card series included advisor views from across Canada

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Methodology notes

Sum may not equal 100% due to rounding.

Advisors were interviewed or took a web survey for either the 2024 Brokerage Report Card (BRC), Dealers' Report Card (DRC) or Report Card on Banks (RCB). Interviews occurred between Jan. 2, 2024, and June 21, 2024.

The advisor sample comprised 1,342 advisors from across 31 companies. Within that group, each of the Big Six banks was represented twice: once in the BRC, focusing on their investment-licensed brokerage arms, and again in the RCB, focusing on their mutual fund-licensed retail bank branches. For iA Financial Group, there were two separate businesses in two separate Report Cards: brokerage firm iA Private Wealth and dealer firm Investia Financial Services Inc. Worldsource Wealth Management Inc. is owned by Desjardins Group and both appear in the DRC, as the two firms operate independently.

Data was collected by *Investment Executive* and, for most of the interviews with Quebec advisors, by *Finance et Investissement*. The French publication also produces annual Report Card data, which is regional only.

¹ Some provinces and territories were grouped into broad regions due to lower advisor populations in those areas, and to protect advisors' anonymity. Source: *Investment Executive* research