

Client Digital Adoption Contest for Advisors

Another chance to win for you and your clients!



The opportunity that awaits you

For your clients

A chance to win \$5,000 in cash

For you

A \$5,000 travel gift card if your client wins

A winning strategy to boost digital adoption while rewarding your excellent work!

How it works



Encourage your clients to log in to the Investia Client Portal or mobile app to automatically register for the contest

Each client who logs in to their Client Portal or mobile app is automatically entered into the draw – giving you an additional chance to win the advisor prize.



Draw

The draw will take place on October 1, 2025.



Double reward

- \$5,000 cash for the winning client
- The winner's advisor will receive a \$5,000 travel gift card

Contest duration

**Until September 30,
2025**

You still have several weeks to maximize your chances and those of your clients. Every login counts!



Added value for your clients



Simple access

Available 24/7



Secure autonomy

Independent management of products in complete security



Automatic participation

A chance to win \$5,000 every quarter upon each login

Your advantages as an advisor

Direct reward

- If your client wins, you will win a \$5,000 travel gift card.

Business efficiency

- Clients more digitally involved
- Fewer administrative follow-ups
- More time for your advisory services

**Winning \$5,000
it's easy!**

Visit my Client Portal

Your action plan

1

Introduce the Client Portal

Demonstrate features at every meeting.

2

Support the first login

Make sure your client logs in successfully.

3

Highlight the benefits

Explain how the Client Portal makes their lives easier.

Login. Simplify. Win.

Encourage each login

A simple step after each
advisory service

Create value

For your clients and yourself

Maximize your chances

More connected clients = more
opportunities

Ready to transform your advisory services into digital success?