iA Private Wealth USA

Integrated cross-border wealth management services

iA Private Wealth USA provides wealth management services to individuals and families residing in the U.S. and Canada. Our services are also available to trusts, estates, corporations and other business entities. All our advisors are licensed in both jurisdictions and fully equipped to help you capture the opportunities and navigate the complexities of cross-border financial management.

Our Services

Portfolio management

Our advisors will build a diversified portfolio that is optimized to achieve your short- and long-term goals. We also offer discretionary management, separately managed accounts and access to alternative investments and options strategies.

High-net-worth solutions

As experienced wealth management advisors, our team excels at meeting the unique requirements of high-net-worth clients. They will take the time to learn about your circumstances and goals and create a personalized roadmap designed to meet your sophisticated needs.

Investment accounts

We offer personal, family, trust and corporate accounts, as well as the following U.S. retirement accounts:

- IRAs
- Roth IRAs
- Spousal IRAs for non-working spouses
- IRAs for minors with earned income
- Qualified retirement account rollovers – 401(k)s, 403(b)s
- Employer-sponsored plans for small to large businesses through SEP and SIMPLE IRAs

Best-in-class partners

Our advisors have longstanding relationships with established and respected providers of tax, estate, legal and other services to ensure all aspects of your wealth plan are fully integrated. Our gold-standard custodial services provider, Pershing LLC, a subsidiary of BNY Mellon, has been an industry leader for over 80 years and has almost US$2 trillion in assets under administration, bringing security and peace of mind to our clients.

Building, growing and preserving wealth takes planning and a holistic vision. When you work with an iA Private Wealth USA Investment Advisor, you have a trusted partner who is fully dedicated to your success.

iA Private Wealth USA

INVESTED IN YOU.

IAPW-USA is a registered Investment Advisor and may only transact business in those states in which it is registered or qualifies for an exemption or exclusion from registration requirements. Any subsequent, direct communication by IAPW-USA with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. Information presented is for educational purposes only and does not intend to make an offer or solicitation for the sale or purchase of any specific securities, investments, or investment strategies.

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