

Corporate Class can deliver benefits at all investment levels

Initial Investment	After-Tax Benefit of Investment in Corporate Class
\$15,000	\$9,284
\$25,000	\$15,473
\$50,000	\$30,947
\$75,000	\$46,420
\$100,000	\$61,894
\$200,000	\$123,787

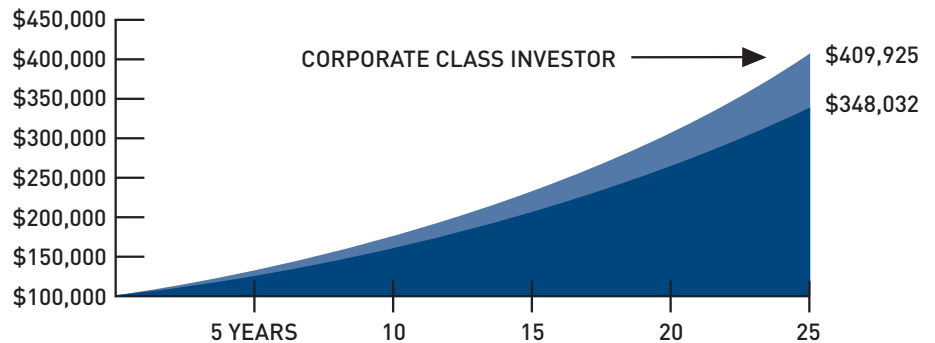
This illustration compares an investment in a selection of funds outside the Corporate Class structure with a similar investment portfolio of funds within the Corporate Class structure, where 60% of the portfolio consists of equity investments realizing an annual return of 8.5% and 40% of the portfolio consists of fixed income exposure investments earning a 3.5% return. The portfolio is rebalanced at each year end resulting in 10% of the funds being sold and reinvested in other funds to maintain the original asset mix.

Over time, it's the tax deferral feature that allows you to accumulate more wealth than if you had to pay tax on your gains each time you rebalanced.

An effective tax-deferral strategy that can work for you.

- ▶ **Build a larger portfolio by deferring taxes on capital gains realized as a result of re-balancing.** An Investors Group Corporate Class portfolio held and re-balanced by an investor for 25 years could result in increased growth of over \$60,000 on a \$100,000 portfolio.
- ▶ **As well, you may experience reduced annual distributions from the Investors Group Corporate Class Structure, allowing for even greater tax efficiencies.**

A \$100,000 Investors Group Corporate Class Portfolio:



The rate of return is used only to illustrate the effects of the compound growth rate and is not intended to reflect future values of the mutual fund or returns on investment in the mutual fund. This example is based on the following assumptions: the mutual fund trusts make annual distributions of their net investment income and capital gains distributions equal to 2% of net assets, a 39% marginal tax rate, an annual capital gain inclusion rate of 50% and that the Corporation pays a 2% capital gain dividend each year. Investments are sold after 25 years.

Benefits of using Investors Group Corporate Class in your Portfolio

One of the most challenging aspects of investment selection is managing the tax implications of re-balancing your portfolio. With Investors Group Corporate Class, you have the flexibility to make asset allocation shifts within the Corporate Class structure without tax consequences at the time of the switch.

Investors Group Corporate Class Inc.™

Your tax-advantaged investment solution

Investors Group Corporate Class, including the Allegro Corporate Class Portfolios™ is a "tax-advantaged" mutual fund structure that gives you the freedom to rebalance your investments, without incurring the immediate tax liability normally triggered by switching between funds. Investors Group Corporate Class also provides true cross-sector and geographic diversification, allowing your Consultant to design a portfolio that reflects your unique tolerance for risk.

Allegro Corporate Class Portfolios™

- ▶ 5 well diversified portfolio options
- ▶ 2 customized conservative approaches
- ▶ Series T shares* designed to provide steady** cash-flow using return of capital

* Series T shares are available on the Allegro Balanced Portfolio Class, the Allegro Balanced Growth Portfolio Class and the Allegro Balanced Growth Canada Focus Portfolio Class as well as holdings in the Investors Capital Yield Class and Investors Short Term Capital Yield Class.

** The cash flow amount is set at the end of each year on or about December 31st for the next year as a percentage of the net asset value per Share but may be adjusted or discontinued if determined by the Corporation to be in the best interests of the Portfolio Class.



This report specifically written and published by Investors Group is presented as a general source of information only, and is not intended as a solicitation to buy or sell specific investments, nor is it intended to provide legal advice. Prospective investors should review the annual report, simplified prospectus, and annual information form of any fund carefully before making an investment decision. Clients should discuss their situation with their Consultant for advice based on their specific circumstances.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

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