



For more than 35 years, T.E. Wealth has acted solely in the best interests of our clients, delivering financial education and individual financial planning to employee groups, without bias or links to product sales. We specialize in designing and implementing programs that execute your organization's financial education responsibilities and offer customized individual learning opportunities that set your company apart. Our Financial Education and Employer Services are designed to support:

- 1 Corporate responsibility for understanding:** Providing information is simply not enough – we deliver customized education programs that are designed to bring understanding of your benefits program to your employees. The method is education – the goal is understanding.
- 2 Mutual accountability for financial security:** Once an employee understands their benefits and pension program, we empower them to become active participants so that financial security is not a mystery or a surprise, but an achievable goal.
- 3 Effective recruitment and retention strategies:** With the effort and energy you invest in attracting and retaining employees, ensuring talented people receive financial and retirement planning is a solid expression of their value to the company. We develop creative solutions to ensure education and planning is available to every employee no matter their status, age or geographic location across the country.
- 4 Long-term corporate governance obligations:** When employees make informed decisions on company plans, risk is reduced. Our proactive attention to corporate governance obligations supports your internal programs while safeguarding your company, board members and management teams.

Our strategic planning process

Whether it is for one of Canada's leading companies or a high net worth individual, our approach begins with the development of a strategic plan that delivers both now and through the long term. Our experience has proven that an ongoing, multi-discipline approach is the most effective way to build knowledge, address different learning styles and deliver to diverse workplace conditions.

Understanding comes first

We begin the process by understanding your needs, defining vital objectives and developing a plan. Corporate culture, organizational challenges and the most effective delivery channels are defined and addressed. Education must be sustainable to be effective – we develop a multi-year budget profile so that implementation is realistic and success is achievable.

More than reporting

Updates and regular communications along with our ongoing analysis of our activities are designed to keep you apprised and to constantly improve the effectiveness of your programs. We want to enhance learning in the most cost-effective manner over the course of our relationship.

Documenting your due diligence

Your financial program is fully documented in your T.E. Wealth Due Diligence file. We maintain the file and help your staff build a proactive financial education governance profile.

Delivery channels for our Financial Education and Employer Services

We bring our highly effective programs to your employees through a variety of proven delivery methods, including:

Individual Financial Planning



Our aim is to empower, taking education and personalizing it for the employee. Whatever their position or asset level, we have the expertise to assist them.

Our retention-oriented retirement and financial assessment programs allow targeted delivery to select employee groups, creating understanding and a fuller appreciation of their total compensation package.

T.E. LEARN



Our internet-based financial education program integrates easily into your organization's Intranet and is customized to your corporate image and programs.

T.E. LEARN features a unique teaser program to regularly engage all employees and deliver timely messages.

Workshops and Seminars



Customized information and education programs are conveniently delivered to your employees at their job site through our dynamic and highly qualified speakers.

About T.E. Wealth

For more than 35 years, T.E. Wealth has provided high net worth individuals and their families, employers and employee groups, and institutional managers with objective, FEE-ONLY™ financial advice and education. The term FEE-ONLY was trademarked by company founder Timothy Egan and demonstrates our longstanding commitment to independent advice and client service. Our consultants' loyalty and years of service are a point of pride at T.E. Wealth, having brought consistency and stability to our clients over the years. With offices across Canada, T.E. Wealth is a national company delivering services to our clients through our partner companies, T.E. Financial Consultants Ltd. and T.E. Investment Counsel Inc.

To learn more about T.E. Wealth's Financial Education and Employer Services please contact:

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