



ProsperiGuide

A PERSONAL FINANCE E-LEARNING PLATFORM
FOR CANADIAN EMPLOYEES

PROSPERIGUIDE: MEET THE EASY-TO-ADMINISTER, HIGH-VALUE EMPLOYEE BENEFIT

It's a fact: managing personal finances remains the leading source of stress among Canadians.

As every employer knows, financial worry leads to less focused and less productive employees. That's why high-performing companies offer their employees ProsperiGuide: a one-stop, personal finance e-tool designed to bolster financial well-being. By keeping employees engaged in their work instead of their finances, ProsperiGuide simply makes good business sense.

Give employees financial tools to plan for today, tomorrow and the future

Created by the financial planning experts at T.E.Wealth, ProsperiGuide provides employees with the help they need to make sound, informed financial decisions and plan appropriately for the future.

Employee financial education is not only a benefit with high perceived value; it also fulfills the responsibilities that sponsors of registered savings plans owe to their members. ProsperiGuide is a robust tool for guiding members through their asset accumulation years and preparing for the payout phase by analyzing needs, comparing products and identifying priorities.



MAKE LEARNING ACCESSIBLE WHILE ENCOURAGING ACTIVE PARTICIPATION

Whether an employee is just starting down the road to financial independence with little financial knowledge or is an experienced investor, ProsperiGuide's content-rich platform helps each user stay the course. Information is relevant and customizable, while covering 6 key pillars of personal finance:



FINANCIAL PLANNING:

Building and managing a personalized financial plan, ways to save money, preparing for life events, finding a financial planner



SAVINGS AND DEBT:

Ways to increase savings and decrease debt, setting priorities, comparing oneself to other Canadians



INVESTING:

How to analyze investment fund reports, how to build a portfolio for now and into the future



RETIREMENT:

Financial calculators to estimate required savings for a secure retirement, features and benefits of registered savings and income vehicles, planning for life after work



TAX:

Tax-saving tips, creating tax-efficient investment accounts, useful resources



LIFE AND DEATH:

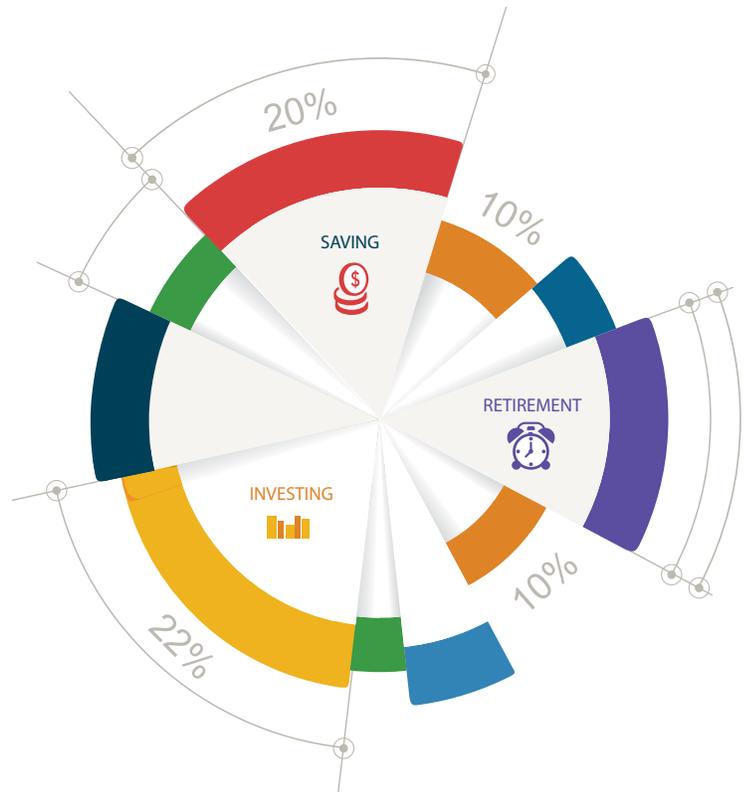
Calculating life insurance needs, pre-planning for loss of life, income or property

ProsperiGuide includes real-world case studies, easy-to-use worksheets and decision-making tools to encourage practice and develop new skills. The interactive *My Checklist* featured throughout the site helps users prioritize tasks and track personal progress. It can only be activated by creating an account, thereby encouraging repeat site visits and continual improvement in financial well-being.

ENJOY ALL THE ADVANTAGES OF PROSPERIGUIDE

- **Accessible** any time, from any device
- **Scalable** to suit companies of any size
- **Available** in both English and French
- **Comprehensive** in scope
- **Cost effective** on a per employee basis

ProsperiGuide is one of the many ways T.E. Wealth helps employees fully appreciate and optimize their benefits and employer-sponsored savings programs, while helping employers mitigate plan sponsor risk.



Ready to boost your employees' financial knowledge? Talk to us.

T · E · W E A L T H
SUCCESSFUL WEALTH STRATEGIES SINCE 1972

VANCOUVER ■ CALGARY ■ OAKVILLE ■ TORONTO ■ MONTREAL ■ QUEBEC CITY ■ ST. JOHN'S

1-888-505-8608

www.tewealth.com info@tewealth.com [Twitter: @TE_Wealth](https://twitter.com/TE_Wealth)

T.E. Wealth (TEW) serves its clients through separate but affiliated entities. General wealth management services are provided by T.E. Financial Consultants Ltd. (TEFCL), and investment management services and advice are provided by T.E. Investment Counsel, a member of iA Investment Counsel Inc. TEW and Doherty & Bryant Financial Strategists are trademarks and business names of TEFCL. TEW and T.E. Investment Counsel are trademarks and business names of iA Investment Counsel Inc.