



# 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



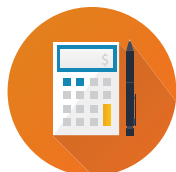
## INVESTING:

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:

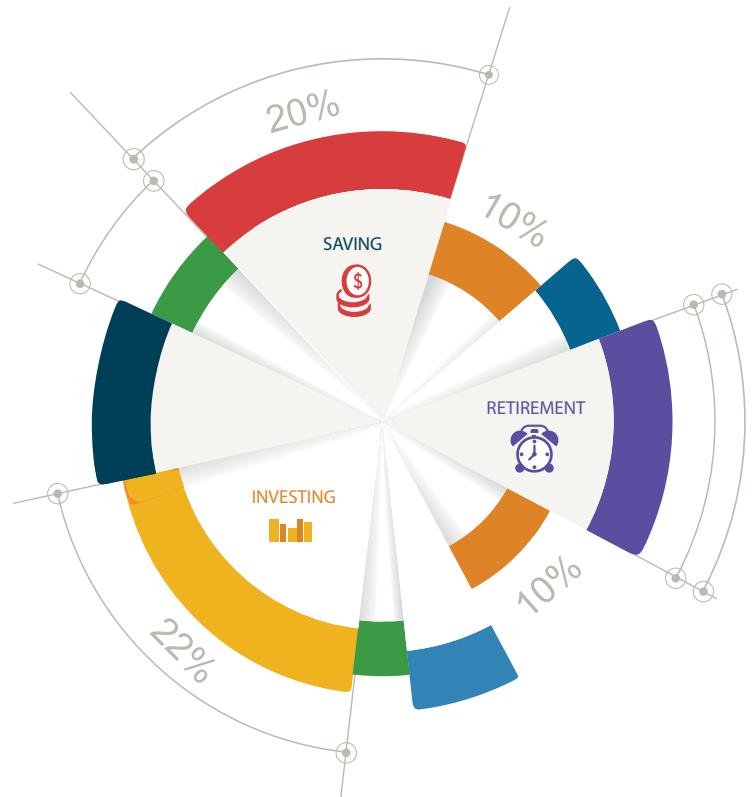
Calculating life insurance needs, pre-planning for loss of life, income or property

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.

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1-888-505-8608

[www.tewealth.com](http://www.tewealth.com) [info@tewealth.com](mailto:info@tewealth.com) Twitter: @TE\_Wealth