



Partner with us to grow your business

As your strategic and supportive Group Retirement and Savings partner, we make it easy for you to grow your business and foster long-term relationships with clients.

For more than 50 years, we have offered Group Retirement and Group Benefit solutions to Canadian businesses. We understand the role that these programs play in helping your clients attract, retain and reward quality employees. We also know what businesses need to support the financial well-being of employees and their loved ones. The right group retirement and savings plan can help employers meet their employees' immediate and long-term financial-security needs. With us, you'll get personalized service, competitiveness, scalability, and flexible, tax-effective solutions.

Why choose us?

- We offer comprehensive group retirement solutions that support and enhance your value proposition to clients.
- We continually invest in system enhancements and process improvements to make it easy to do business with us.
- We are group retirement experts, who foster long-term relationships through regular service meetings, ongoing client and employee education, and proactive approaches around plan sustainability.
- We offer support through our experienced and knowledgeable sales and service professionals.

Our co-operative difference

Our business decisions are guided by our co-operative values. We are committed to community partnership, sustainability, transparency and education. Making people a priority and taking a long-term view are what make us different.

Our promise

As a co-operative, we work to ensure long-term plan sustainability for your clients. You can count on us to listen, adapt, and grow with you as you develop your business.

We offer plans that support immediate and long-term financial goals

Our comprehensive and customizable retirement solutions include savings plans that support the overall financial health of employees, and income plans that help employees throughout retirement. All solutions provide diversified investment options (including opportunities around responsible investing and sustainability) that feature carefully selected funds managed by experienced fund managers. Our investment solutions are reviewed regularly to ensure that they remain competitive and are flexible enough to meet the evolving needs of your clients and their employees.

We offer personalized service

Our focus on personalized service – by way of dedicated team members – means that you and your clients, regardless of their size, get the attention you need. Our in-depth support includes regular service meetings and helpful education sessions for both employees (e.g., on making the most of their plan) and plan sponsors (e.g., on governance responsibilities). The level of our involvement with your clients is always up to you, based on your experience and comfort.

We offer in-depth knowledge and experience

Our knowledge and experience – from over 50 years of working in the Group Retirement space – offers valuable insight into what it takes to help businesses support the financial well-being of their employees. This expertise is at your fingertips, making it easier to foster long-term relationships with your clients.

Ready to grow your business?

Contact your Group Retirement Sales & Service Representative to discuss partnership opportunities with Co-operators.

Investments. Insurance. Advice.



www.cooperators.ca | 1-877-347-6341