Conversation Starter: It’s time to review your plan

Email script for clients with a retirement plan

\*Be sure to update the proper investment fee %

**Subject line:** Cost-savings in your retirement benefits

Hi {client name},

The percentage of working Canadians looking to move jobs has jumped to 50% from 31% in June 2022, according to Robert Half. While most (62%), have their sights set on a higher-paying job, four in ten (39%) are aiming for better workplace benefits and perks.

At a time when every dollar counts, there is a way to help your team’s savings go further. You are currently paying xx in fees. By upgrading to a plan with lower fees and a modern technology platform, you could help your employee save more.

With a modern solution, upgrading your plan can be relatively seamless.

I look forwarding to chatting about ways to improve your retirement benefits.

Warmly,

{Advisor name}

