Conversation Starter: Reduce financial stress

Email script for clients with a retirement plan

\*Be sure to update the proper investment fee %

**Subject line:** Reducing employee financial stress

Hi {client name},

Employee financial stress is at its highest recorded point since the 2008 financial crisis. A [Ceridian survey](https://www.globenewswire.com/news-release/2022/12/09/2571021/0/en/Ceridian-Study-Finds-Financial-Stress-Among-North-Americans-Highest-Since-2008.html) found that 61% employees are stressed about their finances, and 82% say they spend time at work thinking about their financial situation. In Canada, this adds up to $50B in lost productivity.

To promote greater financial wellness, it may be the right time to consider upgrading your retirement benefits plan.

You are currently paying xx in fees. By upgrading to a plan with lower fees and a modern technology platform, your employees could 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}

