Talking Points when positioning Common Wealth with clients

Email script for clients evaluating a group retirement provider

\*Be sure to attach the brochure “ 4 keys to selecting the right retirement provider.”

\*Be sure to update the proper investment fee %

**Subject line:** Introducing Common Wealth as group retirement provider.

Hi [Client name],

Common Wealth offers a RRSP/TFSA plan built on modern technology for mid-sized businesses. They use the latest in technology to provide a better experience than the legacy insurance companies, who are often working with systems that are decades old.

Here are some reasons why I think they could be a great fit for your team:

**Modern technology:** Common Wealth uses the latest cloud-based technology to simplify setting up and running a group plan. Employees can set up their accounts in under 10 minutes on their fully digital platform. The software also walks every employee through a straightforward retirement planning process and is synched to your payroll system.

**Streamlined investment options:** They offer a streamlined suite of Retirement Date Funds via BlackRock – the world's largest investment manager. Their platform features built-in recommendations that automatically match members with a fund that fits their unique needs.

**Fees significantly lower than insurance companies or banks:** Members pay a (1.XX%) investment fee for their investment funds and keep this low fee even after they terminate or retire. This is much lower than the fees charged by insurance companies or banks (usually around 2% for a business with ~100 employees or less).

**Superior service:** You and your team will have direct access to and support from a dedicated Canada-based service team – no offshore call-centres or waiting on responses.

I’ve attached a short brochure and you can see more on their website [here](https://www.commonwealthretirement.com/).

If you’re interested, I’d be happy to set up a short presentation from Common Wealth to see more about their offering.

Warmly,

{Advisor name}