

How to know when

It's time to upgrade your retirement plan



Is your team making as much money as possible through low fees?

If you answer no to any of these questions, it may be time to consider updating your retirement plan.

Member experience



- Can members easily make contributions and transfers?
- Do employees have an intuitive way to track their retirement readiness?
- Can employees access annuities?
- Do employees have low fees, and keep them when they retire or leave your company?

Plan administration

- Can you see when employees join your plan?
- Can you see how much employees contribute?
- Do you get immediate updates when employees change their contribution amount?
- Is it easy to add or remove employees?

Quality service

- Do you have access to a retirement specialist?
- Do you and your employees get access to support on chat, email, phone and online?

The lag of technology innovation in traditional retirement plans results in complex, manual, and expensive administration, making it difficult to compete with modern solutions that offer low fees and a steady stream of great features.

Common Wealth offers a fast, secure, and digitally enabled solution for easy administration and better member outcomes.

- Fully digital plan setup, onboarding and offboarding
- Digital plan administration with payroll integration
- Responsive, human support for employers and members
- Built-in personalized planning with financial tips to maximize your money
- Easy transfers and contributions
- Ability to move RRSP funds into guaranteed lifetime income (annuities)
- Members keep a low-fee plan for life
- Modern, secure cloud-based technology with SOC2 compliance



Pensions&Investments

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**Talk to your advisor about
Common Wealth**

commonwealthretirement.com