Your 2023 group retirement plan communication and education campaign

Education centered around adult learning

Understanding how adults learn is key to providing effective adult education. Adult learners bring certain experiences and self-awareness to learning. To understand adult learning, it's important to consider the various learning styles and what they entail. These styles include:

- **Selective:** Adults learn what's meaningful to them and for them.
- **Self-directed:** Adults identify their learning needs, set goals and choose how to learn.
- **Self-focused:** Adults want to learn from content that has a direct application to their lives.

Clarity and conversation

An effective education strategy helps ensure your employees' needs are being met, regardless of which planning stage they're in. This 2023 strategy was created to give them access to helpful information – as well as the means to get answers to the questions they have.

Campaign	Timing	Tactics	Call to action
RRSPs and TFSAs: Facts, tax and impacts	Q1	**Poster 1**: Promotes webinar **Poster 2:** Key aspects of RRSP and TFSA **Webinar**: Shares important information about deadlines and maximums, benefits and other tidbits that can be helpful to all members and provides the opportunity for Q&A through Slido. **Email**: Summarizes key takeaways from webinar content and links to webinar recording **Potential tactic**: Add applicable content to financial well-being landing page at canlife.co/wellbeing or summarized information in the Articles and videos section of My Canada Life at Work™.	Beat the RRSP contribution deadline and sign in to My Canada Life at Work to make or increase contributions. **A national member education webinar focusing on this topic will take place on Jan. 18, 2023.**
A conversation about inflation	Q2	**Poster 1**: Promotes webinar **Poster 2:** All about inflation **Webinar**: Provides members the opportunity to participate in a fireside chat with a panel of group retirement services representatives to hear a key-points summary and get answers to their questions through Slido. **Email**: Summarizes key takeaways from webinar content and links to webinar recording **Potential tactic**: Add applicable content to financial well-being landing page at canlife.co/wellbeing or summarized information in the Articles and videos section of My Canada Life at Work.	Connect with a health and wealth consultant or talk to your advisor for help navigating the current market and making sure you're on track. **A national member education webinar focusing on this topic will take place on May 17, 2023.**
Get on track. Stay on track.	Q3	**Poster 1**: Promotes webinar **Poster 2:** Provides information about key considerations to determine how much is enough, running financial numbers and using various tools and resources **Webinar**: Gives members an overview of the key aspects involved in making the most of their plan so they can get/stay on track for the future they want – and leaving plenty of time for casual conversation and a helpful Q&A period through Slido. **Email**: Summarizes key takeaways from webinar content and links to webinar recording **Potential tactic**: Add applicable content to financial well-being landing page at canlife.co/wellbeing or summarized information in the Articles and videos section of My Canada Life at Work.	Set or update a retirement income goal or use the Contributions Calculator and other helpful tools and resources made available through Canada Life. **A national member education webinar focusing on this topic will take place on Sept. 20, 2023.**
Well-being week	Q4	**Poster 1**: Promotes a week full of short sessions **Sessions**: Focus on financial, physical and mental well-being and the various services and supports available to members though Canada Life's group savings plans. A range of 15-30-minute sessions dealing with various topics will be available for members to attend, learn from and ask questions through Slido. **Potential tactic**: Add applicable content to financial well-being landing page at canlife.co/wellbeing or summarized information in the Articles and videos section of My Canada Life at Work.	Make the most of your group plan by taking advantage of Canada Life's programs and supports, such as: • RESP • Financial Literacy + KOHO + Credit Counselling • Workplace Strategies for Mental Health + Health Connected • Freedom to Choose™ health and dental insurance • NextStep **National member education webinars focusing on these topics will take place on Nov. 20-24, 2023.**

Ongoing tools and resources

Communication method	Description
My Canada Life At Work	When members need quick access to the tools and information to help manage their plans, they can log onto mycanadalifeatwork.com to: • Update their contact and beneficiary information • Check their account balance and review and track investment options • See their personal rate of return on their investments • View and print statements and get original and duplicate RRSP tax receipts • Handle transactions and make pre-authorized contributions (if applicable) • Set, update and track a retirement goal • Read up on educational articles
Smart Path	The Smart Path online learning resource is full of videos and informative articles and provides access to helpful tools such as the: • Contributions calculator • Impact of withdrawal tool • Income wizard
Canada Life health and wealth consultants	Canada Life health and wealth consultants are licensed and non-commissioned specialists available to help members understand and utilize their plan. Whether it's helping them register for the website, planning for their goals or answering questions about their plan, they will provide honest and impartial guidance. Members can visit canlife.co/schedule to book an appointment with a licenced representative.
Client Service Centre	• With more than 240 available languages, members can ask questions about their group savings plan in the language of their choice. • When members call us, a customer service representative will gladly match them with an interpreter who speaks their preferred language. • Members can call us at 1-800-724-3402, Monday to Friday, between 8 a.m. and 8 p.m., ET.
Member statements and retirement illustrations	**Member statements** These provide an opportunity for members to review their balance, activity within their plan and their personal rate of return. Statement messages are triggered by the member's account demographics and investment selection. Messages include tips and calls to action to help them stay on track. **Retirement illustrations** These provide a visual update of the member's path to their retirement goal and are available online and in print – with slight differences. Now members can instantly see their statement online with no more download time – and it will look like their printed statements complete with smart messages. The statements are WCAG compliant for those who need in an accessible format. **Online:** Members can sign in to My Canada Life At Work to set a personalized retirement savings goal. After that, whenever they sign in, they'll see their progress and can update their goal how and when they see fit. Members are encouraged to set a goal online so they can see the most personalized and updated view of their progress.
Simply Speaking newsletter	This bi-annual, education-focused newsletter is now exclusively available in digital format. Topics covered include important updates, news, resources and other matters to help members better understand and make the most of their group savings plan.