

## **Email template**

Hello [NAME],

We're thrilled to announce the launch of our Group Retirement Savings Plan (GRSP) with Wealthsimple. Wealthsimple is Canada's leading financial technology company that offers a broad suite of financial products. They leverage technology to provide better service at a fraction of the cost many providers charge today.

GRSPs are a great way to save for retirement or major purchases such as your first home or additional education. You receive immediate tax relief since contributions are pre-tax and the GRSP account is tax-sheltered.

[INSERT PLAN MATCHING INFORMATION HERE]

### **Setting Up an Account**

If you wish to contribute, please set up your Wealthsimple account by [DATE]. First GRSP contributions will be applied to payroll on [DATE].

This requires just 3 easy steps from you:

1. Set up a Wealthsimple GRSP account
2. Accept and eSign your account agreement
3. Enter how much you want to contribute

You will receive an email invitation from Wealthsimple to set up your GRSP account in the coming days. If you need extra help, watch this [step-by-step video](#).

If you already have a Wealthsimple profile, please click on the link to login using your existing profile and your GRSP account will be automatically linked to your existing profile. If you do not have a Wealthsimple profile, follow the link to create one and be sure to sign up with your personal email address so that you always have access to this account.

### **Additional Resources**

Wealthsimple provides a wealth of information in their mobile app and website to help you invest your money such as their [Personal Finance 101](#), [Investing Master Class](#), and [FAQs](#). But if you find you still need help, they have a team of licenced portfolio managers that are available for 1:1 meetings. You can book a call [here](#).

Should you have any questions about how it all works, you can reach the team that's supporting us at [w4w@wealthsimple.com](mailto:w4w@wealthsimple.com).

## **External templates**

### **1. Social media post**

Announcing our exciting partnership with @Wealthsimple...

Expanding our list of comprehensive employee benefits, we're proud to announce our Group Retirement Savings Plan (GRSP) with Wealthsimple Work – the leading group retirement savings program in Canada. Low fees and intelligent portfolios make Wealthsimple the smarter way to help our employees with long-term savings, whether that's for retirement, a home purchase, or continuing education.

We look forward to helping all our employees grow their financial health as they grow with us.

Want to join our team? Visit our careers page to see open roles: [<link>](#)

### **2. Blog post**

At [company name], we believe it's important to invest in our people. This includes a total rewards package that helps them thrive — both at work and outside of it.

Expanding our list of comprehensive employee benefits, we're proud to announce our partnership with [Wealthsimple Work](#) – the leading group retirement savings program in Canada – to create our Group Retirement Savings Plan (GRSP). Low fees and intelligent portfolios make Wealthsimple the smarter way to help our employees with long-term savings, whether that's for retirement, a home purchase, or continuing education.

Our Wealthsimple Group Retirement Savings Plan (GRSP) includes the following features:

- [any conditions of enrolment e.g. 1-year of employment with the company]
- [any employer matching]
- Personal and group RRSP on the same platform
- Access to 1:1 sessions with portfolio managers
- Award-winning platform that lets you monitor performance and make changes easily
- Socially Responsible Investing (SRI) and Halal portfolios available

We look forward to helping all our employees grow their financial health as they grow with us.

Want to join our team and take advantage of this and many other outstanding benefits? Visit our [<link> careers page <link>](#) to see open roles.