



Guided Outcomes™: Eckler's Financial Wellness Solution

Helping Canadians achieve their financial goals through unbiased expert insights

With Eckler's Guided Outcomes™ (GO), employees get the tools and insights they need to set, plan and obtain their financial goals. Employers get the analytics they need to make strategic decisions that support employee financial health and achieve organizational objectives.

At Eckler, we believe that people and businesses everywhere deserve to secure and safeguard their future. While a good retirement plan and sound investment strategy are key components, we believe in a broader vision and a more holistic approach.

For many Canadians, understanding and managing multiple financial assets and obligations is a complex and daunting task that can contribute to significant stress, impact work performance and delay retirement. In fact, almost half of working Canadians admit that stress related to personal finances has had an impact on their performance at work.

We want to change that. We think you might like to change it too.



GO Journey for Plan Members

At Eckler, we believe that plan members need to be actively engaged in planning and managing their financial health. Whether looking to pay down student debt, learning how to save for a house, planning for their children's education, or retiring, Eckler offers a robust suite of tools to help plan members set, and achieve, their financial goals.



- **Member Statements:** With GO Member Statements, plan members gain critical understanding of their retirement readiness and what they can do to close any gaps.
- **Start, Dream, Plan:** With Eckler's online portal, members will journey through a series of modules (GO Start, GO Dream, GO Plan) that will help them assess their current situation, set realistic goals, and stay on track.
- **Financial planning workshops:** Recent research tells us that plan sponsors and plan members alike want unbiased financial education, delivered by accredited professionals. Whether a one-hour session, a full-day workshop, or one-on-one coaching, our certified financial planners can help your plan members achieve their financial goals.

GO Insights for Plan Sponsors



Retirement income adequacy is a growing concern for Canadians. It's more important than ever to understand what your plan delivers, so you can make sure your members get what they need from it.

GO provides the analytics to assess, strategize and implement solutions so your workforce can achieve their retirement goals. By marrying your existing HR information and data from your plan carrier, we implement sophisticated analytics using an award-winning economic scenario generator.

It illustrates the likelihood of your plan members' achieving the same level of living standards when they retire as they enjoyed while working – or the Living Standard Replacement Rate™.

Detailed analysis (by salary levels, tenure, age, or division) ensures you're making strategic decisions about which actions can help close the gaps for your employees and ensure your organizational objectives.

Our financial wellness services are backed by 90 years of unbiased expertise in helping Canadian employers, and their employees, achieve their financial objectives. To learn more, we invite you to connect with your Eckler consultant, or visit us at eckler.ca to learn more.