

# Do you have investment accounts with multiple financial institutions?

Spreading your savings between multiple financial institutions can make managing your investments unnecessarily complicated.

## It's easier to track and manage your investments when they're all in one place.

If you have personal savings at other financial institutions or a savings plan with a previous employer, here are five reasons to transfer them to Canada Life:

- **Get information at-a-glance** – Track the performance of your investments in one place, without the need for multiple passwords, websites and advisors.
- **Take control of risk** – Having a holistic view of your investments can make it easier for you to notice when your portfolio doesn't align with your risk tolerance and make changes to correct it.
- **Reduce fees** – There aren't account fees with Canada Life and we don't charge you to change your investment selection. Also, our investment management fees are typically lower than what you'd pay for similar individual investments outside of your group savings plan.
- **Streamline record keeping** – Tax time is easier when you only need to go to one place to get your statements and tax receipts.
- **Easier retirement and estate planning** – Having one point of contact simplifies tasks like calculating your retirement income and leaving instructions for transferring your estate to your loved ones.
- **Bonus reason** – You can keep your investments with Canada Life even when you retire or leave your group plan.

### Next step



Book a meeting with a health and wealth consultant for help transferring in your investments to Canada Life. They can also help you choose investments, set financial goals and make the most of your group retirement and savings plan.