



My Financial Insight

Personalized advice service
Your story is unique. Let's write it together.



Financial wellbeing isn't just about numbers.

It's about envisioning your life goals, your dreams, your next steps, all with the peace of mind that everything is in place to achieve them.

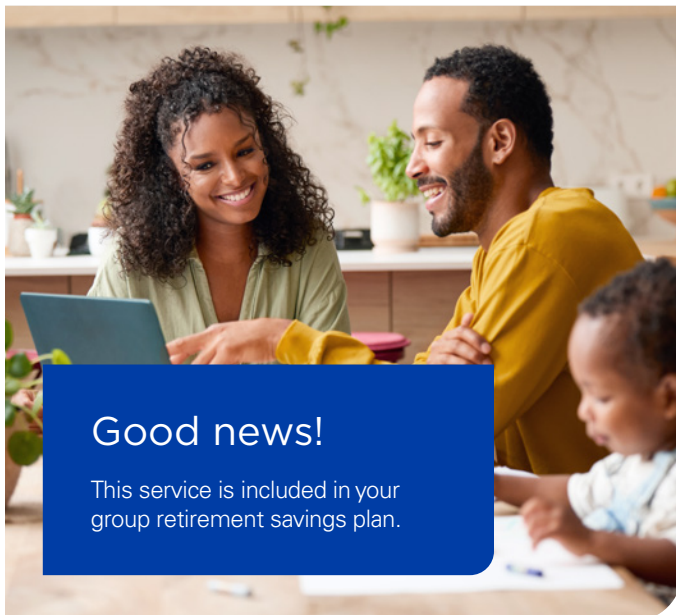
That's why our team of experts offers **My Financial Insight**, a personalized advice service designed to provide thoughtful guidance to help you reach your goals while respecting your unique financial reality.



Did you know?

In 2025, 42% of Canadians main source of stress was money, with the percentage trending upwards from 38% in 2021.

People who consult a qualified professional tend to feel less overwhelmed.¹



The advantages of working with an expert

Many people struggle to navigate the complexities of saving, investing, retirement and financial planning.

No matter how much you know about finances, speaking with a qualified expert can give you the reassurance you need to take control of your financial future.

Beyond improving your financial wellbeing and giving you peace of mind, working with a qualified expert also builds your confidence in your financial decisions and gives you a clearer understanding of the options available to you.²

Strategies that offer peace of mind

There's more to financial wellbeing than building a comfortable retirement. It's also about taking time to build strategies to achieve your goals at every stage —short, medium, and long term.

We're here to support you in finding the approach that fits your unique situation.

- Buying a home
- Paying off debt
- Renovations
- Travel
- Children's education
- Etc.

¹The 2025 Financial Stress Index: Key Takeaways for Financial Planners, 2025.

²Value of Financial Planning Consumer Study, Financial Planning Standards Board, 2023.

Our services



General advice

- Analyze your personal financial situation
- Develop a personalized savings strategy
- Optimize your group retirement savings plan contributions
- Make recommendations on additional services, such as life insurance, health and disability insurance, education savings plans, etc., as needed.



Investment advice

- Review your existing portfolio and investment performance
- Help you complete your investor profile
- Optimize your investments



Retirement advice

- Prepare retirement income projections
- Discuss financial planning details and establish a plan
- Make recommendations on retirement income strategies

Examples of what My Financial Insight can do for you³

Need	Solution
Group RRSP advice	✓ Review your assets and contribution strategy to make sure you're on track to meet your retirement goals
Retirement strategy planning	✓ Assess your retirement readiness and develop a personalized savings strategy (e.g. catch-up contributions, asset reallocation, etc.).
Early retirement planning <i>With a registered pension plan (RPP)</i>	✓ Review RPP details and run simulations of early retirement scenarios
Portfolio analysis	✓ Rebalance your portfolio to align with your investor profile
Purchase of a first home	✓ Explain the FHSA and HBP, and create a budget for home ownership

³ Based on the specifics of your plan. For details, see the documents provided by your HR department.

Our team is:

Here for you

We build lasting trust through an ongoing relationship with an advisor.

Ready to listen

We want to hear your story so we can better support your financial goals.

Qualified

We partner with you to create the best strategy and adjust as your situation evolves.

Make an appointment:

It's always the right time to take charge of your financial wellbeing!

Make an appointment now with a member of the Financial Insight team*
ia.ca/gsr-advice



*Certified life and health insurance representative
(or financial security advisor in Quebec).





One partner for all life's stages

We're invested in you by helping you achieve total wellbeing with first-class service that combines the human and digital experience.

We support you in your day-to-day by helping you take full advantage of your group plans through tips, resources and intuitive tools.

Need help?

For more information, please contact **Customer Service** at 1-800-567-5670, Monday through Friday, 8 a.m. to 8 p.m. (ET).

INVESTED IN YOU.

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