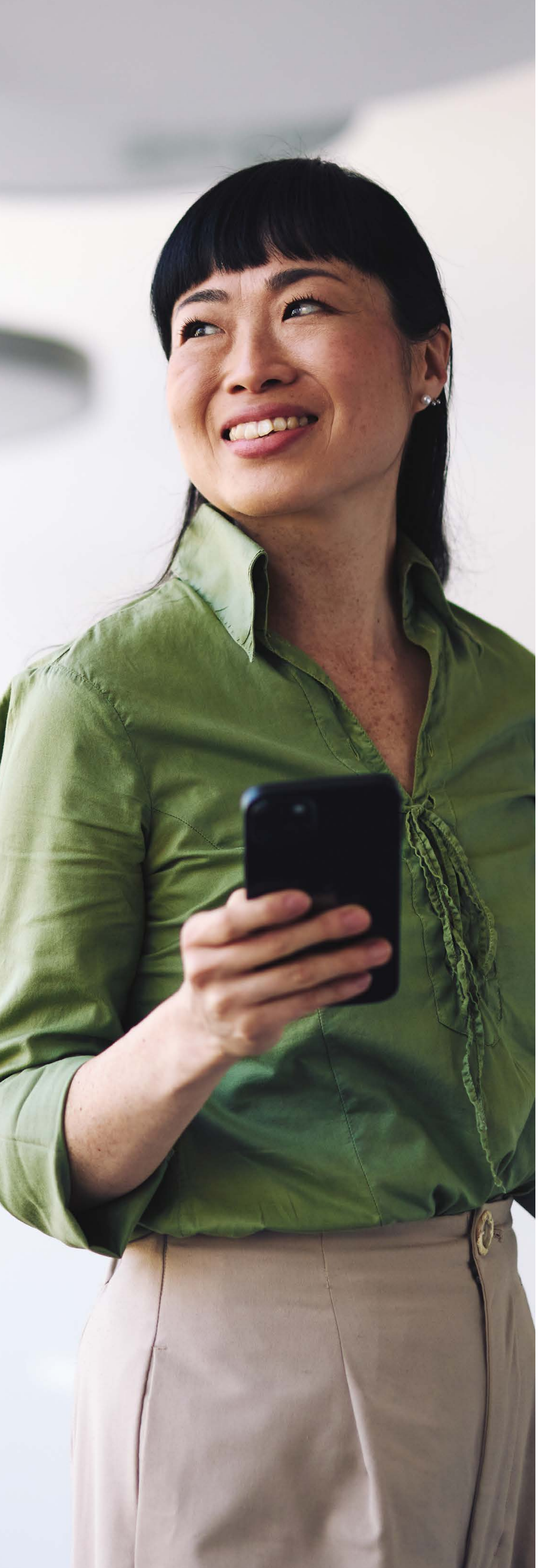
Saving for Life

2026 program

Empowering members to reach their savings goals

Saving is one of the best things we can do to support our financial, mental and even physical well-being, today and into the future. Yet many Canadians struggle to save.[1] Fortunately, you've already given your plan members access to one of the most powerful saving tools available – their workplace retirement plan.



Now, let's help them make the most of it.

The **Saving for Life** program is a suite of education resources designed to grow your members' financial literacy and help them reach their goals. From newsletters to interactive webinars, members will get the information they need to help them unlock the power of their workplace retirement plan, wherever they are in their saving journey.

What's included:

- Newsletter
- Education Resource Centre
- Webinars
- Self-serve resources

84% of employees **want financial education at work.**[2]

Newsletter

When members have a good understanding of their workplace retirement plan, they can maximize its benefits. Our **Saving for Life newsletter** delivers in-depth information about their plan straight to their inboxes twice a year. You'll get a preview of it in your newsletter before it goes out.

Recent topics include:

- The perks of your plan
- 3 ways payroll deductions help you save
- Get to know group RRSPs
- Managing your savings online

Education Resource Centre

We regularly share information with your members, but it's important you have member communications to deploy when it works best for your organization too. That's why last year we launched the Saving for Life – Education Resource centre. It gives you easy access to some of our most-requested member education communications.

New in 2026, we've expanded the site and turned it into a comprehensive library of resources for you to share. You can use them as-is, or incorporate the copy into your own communications, like in an employee newsletter or internal site.

On **canadalife.com/education-resource-centre** you'll find:

- Campaigns (emails, posters and drop cards)
- Brochures and booklets
- Decision-making tools and calculators
- Short videos
- Articles

We're not done yet – the library is still growing. We're adding new content regularly. Each quarter, we'll highlight a new or recommended campaign in your newsletter to help you keep track of what's available.

Webinars

Saving for Life webinars help members improve their financial literacy and learn more about how their workplace retirement plan can help them reach their goals. With an average of two webinars a month, it's easy for members to learn about the topics that matter most to them.

Each quarter, we'll email your members an invitation to register for upcoming webinars. The email will redirect them to our website where they can sign up for webinars that interest them. The webinars are interactive — members can use the chat feature to ask questions. A couple days after the broadcast, registrants are emailed a recording along with a summary of key takeaways. This allows registrants who couldn't attend at the scheduled time to benefit from the information shared.

Visit the webinar website at canadalife.com/saving-for-life-webinars for the current webinar schedule.

Go to canadalife.com/education-resource-centre for promotional materials.

83% of Canadians

are most likely to trust educators to deliver a complete financial education.[3]

Here's an overview of the topics we offer:

New Investing: Market update

Featuring a guest from Canada Life's Investment Solution team, this webinar gives members expert insight into what's happening in financial markets and how their investments may be impacted.

New Her money: Breaking barriers together

Women face unique gender-based barriers when trying to become financially better off. This webinar discusses some of these obstacles and highlights how their plan can help them reach their savings goals.

New Gen Z money: Goal getters

Gen Z is entering the workforce at a time when reaching their savings goals is harder than it was for generations before them. This webinar acknowledges these challenges while highlighting their plan's features that can help them reach their goals.

Investing: Basics for beginners

Investing can be complicated, but it doesn't have to be. This webinar is ideal for members who are new to investing. It teaches them basic investing vocabulary and highlights some of our most straightforward investing options.

Investing: Beyond the basics

For members who want to take a more hands-on approach to investing, this webinar gives them step-by-step instructions on how to create a portfolio that aligns with their goals. It covers investment risks, investment management styles, how to find their investment personality and more.

Managing debt: From stress to security

Debt can be a major barrier to saving. This webinar offers practical steps to manage debt and highlights resources that can help members take control.

Retirement: Getting close

Ideal for members who are five to ten years away from retirement, this session covers key considerations and next steps to help them prepare with confidence.

Retirement: Saving for your future

Often, members want to save for retirement but aren't confident in what actions to take. This webinar gives members step-by-step instructions for figuring out how much they need to save and lets them know how their plan can help them get there.

Retirement: Where will my money come from?

Understanding potential income sources. in retirement can help you plan for one you can look forward to. This webinar reviews how all three retirement income sources work together to provide income in retirement. It includes a review of government retirement benefits; Canada Pension Plan (CPP), Quebec Pension Plan (QPP) and Old Age Security (OAS).

RRSPs and TFSAs: Facts, tax and impacts

Registered retirement savings plans (RRSPs and tax-free savings accounts (TFSAs) can be powerful tools in building long-term savings. This webinar helps members learn more about these tax-friendly saving options.

Welcome to Canada: The Canadian retirement system

This webinar helps new Canadians learn more about the financial aspects of retiring in Canada. They'll learn about Canada's financial system, registered accounts and how their plan fits into the bigger retirement savings picture.

Your plan: Welcome to Canada Life

A great starting point for new members – or a refresher for existing ones. This webinar is an introduction to the features and benefits of Canada Life workplace retirement plans.

ASL and LSQ video hubs

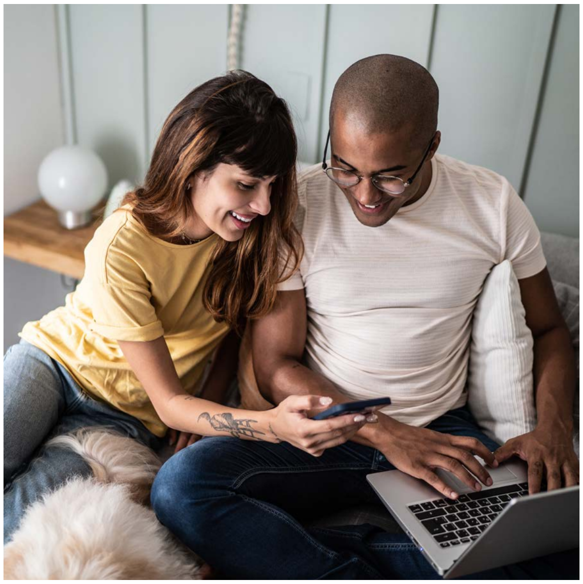
At Canada Life, we're committed to Diversity, Equity and Inclusion. We believe everyone should have access to financial literacy resources.

Yet, according to a 2023 report[4] published by the Canadian Association of the Deaf, there are very few online financial literacy resources in American Sign Language (ASL) or Langue des signes Québécoise (LSQ). What resources are available are typically produced only in ASL and are American. Because of this, they don't cover critical Canadian financial topics, like RRSPs.

That's why we're proud to share our new ASL and LSQ video hubs. These on-demand videos feature some of our most popular webinar content, now made accessible for deaf and hard of hearing members.

Explore the hubs:

- ASL video hub at canadalife.com/saving-for-life-asl
- LSQ video hub canadavie.com/epargner-pour-la-vie-lsq



Self-serve resources

We know your members have busy schedules. Our self-serve education resources allow them to get information about their plans and enhance their financial literacy when it's convenient for them.

My Canada Life at Work™ is your members' online portal to their savings. When they sign in they can:

- Review and manage their plans
- Find their total balance
- Get in-depth information about investment funds
- Select and change their investments*
- Update beneficiaries*
- Adjust contribution amounts*
- Retrieve statements and tax receipts*
- Track and set a retirement goal
- And more!

*If applicable

On **canadalife.com/smartpath**, members can access a library of financial education articles. They cover a variety of topics designed to help them learn more about financial planning through the various stages of their lives – like when they have a child, start a new career or are getting ready to retire.

Investment and Retirement Specialists are a team of licensed professionals who are available exclusively to workplace retirement plan members. Members can meet with them over phone or video call and get information about their plan and help managing their savings. Members can book a meeting by visiting **canadalife.com/freedomexperience**.

Wealthgoal is an optional financial education service you can add to your plan for an additional fee. While the Saving for Life program is designed to provide members with education related to their workplace retirement plan, the education Wealthgoal provides is more holistic. It includes educational resources on a broader range of topics and allows members to learn in a way that's right for them – whether it's by reading articles, watching videos or using one of the 30 calculators on their site.

Sources

1 Retirement savings: Half of Canadians unprepared, survey says | CTV News
2 The case for teaching financial literacy in the workplace - ABC Life Literacy Canada
3 Financial Literacy Study | Edward Jones
4 Financial Sector Project - Canadian Association of the Deaf - Association des Sourds du Canada