

heartbeat

March 2020 Newsletter



Planning for Your Retirement

Whether you're just starting out with your career or are nearing your retirement, being proactive and putting a financial plan into place can help you build the life you want to live after you stop working.

Money



Planning for Your Retirement: Things to Consider

When we think about retiring, most of us imagine a time when we won't have to rush off to work, we'll enjoy leisure activities, and have time simply to relax. We may worry about how we'll manage financially once we leave our full-time jobs. Few of us have made solid plans for our retirement that include looking at our finances, personal relationships, and meaningful activities.

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Money

Working with a Financial Planner

A financial planner helps clients make choices about what to do with their money, property, and other assets. Most financial planners are experts in certain areas but they should all be able to help with life insurance, investing, school savings, retirement plans, tax implications, and estate planning.

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People Leader's Corner

Supporting Financial Wellness as a Manager

From making ends meet to saving for an emergency, money is the primary source of stress for most Canadians and it can follow people to work. Financial wellness has an impact not only on employee well-being but also on the corporate bottom line, because high levels of stress can lower productivity and lead to absences. As a manager, it is vital that you learn how to support financial wellness among your team.

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Featured Product

March 2020 Video

Finding a Sense of Purpose in Retirement

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895 Don Mills Road, Tower One, Suite 700
Toronto, ON M3C 1W3

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