

TAKE CARE  
OF YOUR  
EMPLOYEES



**UNISON**  
FINANCIAL SOLUTIONS  
EMPOWER YOUR FINANCIAL FUTURE



# WHY GROUP BENEFITS ARE IMPORTANT?



Attract  
new talents



Keep  
your employees  
satisfied  
& make them  
feel valued



Promote  
a healthy workplace  
for everyone



Support  
your employees  
in their financial journey



Tax-deductible  
for the company





# WHAT ARE GROUP BENEFITS?



## Group Insurance & Wellness Benefits

- Medical / Extended Health Care  
*(drugs, paramedical, travel, etc.)*
- Dental Care
- Disability & Critical Illness insurances
- Life insurance
- Health & Personal Spending Accounts



and more



## Group Retirement Services

- Registered Retirement Savings Plan (*RRSP*)
- Defined Contribution Pension Plan (*DCPP*)
- Deferred Profit-Sharing Plan (*DPSP*)



and more





Virtual care  
solutions  
Telemedicine



Mental health  
assistance programs  
Stress Management  
& Well-being

MAKE A REAL  
DIFFERENCE  
IN YOUR  
EMPLOYEES'  
LIVES



Family building  
Fertility  
Surrogacy  
Gender affirmation  
coverage



Health  
& Personal Spending  
accounts





# WHY PARTNER WITH OUR TEAM?



## We take care for your employees

- 1 on 1 introductory virtual meeting to go over their new benefits
- General Investment Advice *(for group investments)*
- Complementary financial review & advice *(personal investments, insurances, etc.)*
- Access to our trusted network *(advisors, accountants, real estate brokers, etc.)*





# WHY PARTNER WITH OUR TEAM?



## We advise shareholders & key persons

- Complementary financial planning
- Business Succession planning, including shareholder agreements
- Key Person Protection
  - Life, Disability & Critical Illness
- Tax-efficient corporate investments
- We work closely with your tax & legal professionals



# WHY PARTNER WITH OUR TEAM?

## We partner with you for the long term

- We keep an eye on what's new  
in the industry
- At renewal, we negotiate  
the premiums & eventually  
go back to the market
- We help solve problems  
you and your employees may  
encounter in a timely fashion





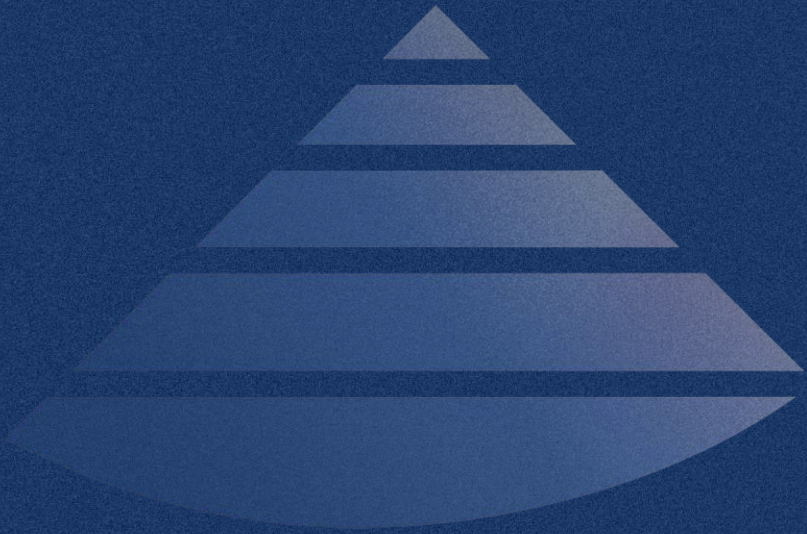
# WHY PARTNER WITH OUR TEAM?



We value  
financial literacy for all  
& Responsible  
Investments



Our team  
is 100% digital  
& work in French,  
English and Mandarin



We specialize  
in advising  
newcomers to Canada  
& the LGBTQ2+  
community



# OUR 2 TO 3 MONTHS PROCESS



Information gathering  
—1-2 weeks

(Company, employees, etc.)

Presentation of plans & quotes  
—1-3 weeks

+ revising the plan options, if needed



Introductory talks

- Present our team and services
- Define your situation, needs & budget
- Draft plan designs and discuss specifics

Quotes with different insurers & Group Retirement services providers  
—2-3 weeks

- depending on the situation: Sun Life, Manulife, Canada life, Desjardins, Blue Cross, RBC, etc.

Enrollment & setup  
—1-3 weeks





# ALREADY HAVE GROUP BENEFITS IN PLACE?



**Mandate our team  
and allow us to 'shop' for you**

If you have been with your provider for more than 2 years, we will retrieve the information we need from your current insurer and continue with the quote process.

**OR**



**Keep your actual group benefits  
& appoint our team as  
your advisors of record**


If you are satisfied with your group benefits but not with the service you get from your advisor, work with us instead!  
No need to change the product; all it takes is a signed letter of advisory firm change.



# ABOUT US



Jeffrey Wu (Pl. Fin)  
Certified Financial  
Planner

 jeffreyhaowu



ShanShan Li  
Financial Security  
Advisor



Julien Valat  
Financial Security Advisor  
& Responsible Investment Specialist

 juliervalat



Read what our clients  
have to say about us →



Learn more about our team →



Let's book a virtual meeting →