



Valeo⁺

CASE STUDY



MANUFACTURING
COMPANY



OVER 600
ACTIVE
EMPLOYEES

Simplified
Pension Plan (SPP)

Service provided
by insurer

ACTION PLAN (YEAR 1)

1 FINANCIAL WELLNESS COMMITTEE

112 CONTRIBUTIONS OPTIMIZED

182 INDIVIDUAL MEETINGS
DOCUMENTED

12 INCOMPLETE / INCORRECT FILES
UPDATED

49 NON-CONFORMING BENEFICIARY
DESIGNATIONS UPDATED

29 NEW ENROLMENTS

4 RETIREMENT PLANS DEVELOPED

CURRENT PORTRAIT

Lower
administration
costs
45%

Higher
participation
rate
24%

Implementation
of Valeo+ Financial
Health Index

Higher overall
appreciation for
employee benefits

Improved
financial
knowledge