

CASE STUDY

A SOLID RETURN ON INVESTMENT

Large client with several offices across Canada. Valeo+ Financial Wellness Program implemented in 2017. Valeo+ Financial Health Index implemented in 2020.



Inflationary economic environment with substantial interest rate hikes.

92% Satisfaction Survey

Cumulative average level of employee satisfaction with various group meetings related to their benefit plans and finances in general.

6.54/10 Valeo+ Financial Health Index

(For the Canadian labour force as a whole, the average is estimated to be below 5/10).



Excellent information! I learned a lot. Can't wait for the next seminar!"

"Always interesting to have a team you can rely on that is not trying to sell a product."

"Interesting and accessible presentation. The facilitators were very good!"



OUR ACTIVITIES IN 2022

- 10 seminars (English-French) on topical economic issues (inflation, rising interest rates, Canadian real estate market, portfolio optimization strategies, etc.)
- Nearly 700 people attended the various annual meetings.
- Employees were given practical tools to support them in handling their personal finances.
- 4 strategic meetings with the employer to provide guidance for optimizing the employee benefit program.

RESULTS

- Assets under management up 223%.
- Retirement savings plan membership increased by 153%.
- Reduced presenteeism and absenteeism.
- Employees have a solid, up-to-date financial plan, more aligned with their goals.
- Improved financial literacy among participants.
- Promotion of employee benefits leading to greater overall sense of appreciation for them.

