

2020 -
2021

Five Good Ideas

for building financial health
through the workplace



Alex Mazer, Founding Partner, Common Wealth, and Nora Beatty, Director of People Operations, Common Wealth

Wednesday, October 28, 2020 - 1:00 to 1:45 p.m.

With over 40% of Canadians living paycheck to paycheck, more employers are asking what they can do to increase the financial health of their staff. Alex Mazer and Nora Beatty of workplace retirement plan provider Common Wealth will share their five good ideas to help you build financial security in the short and longer term. As an employer, you will come away with ideas you can take to reduce financial stress for your employees; as an individual, you will learn ways to make your hard-earned savings go further.



Alex Mazer is co-founder of Common Wealth, a mission-driven business that works with associations, unions, and groups of employers to provide workplace retirement plans. The company's focus is on constituencies that are uncovered or under-served by traditional employer-sponsored retirement arrangements. Before co-founding Common Wealth, Alex served as a management consultant at McKinsey & Company and in various public service roles. As Director of Policy to the Ontario Minister of Finance during the global financial crisis, Alex helped deliver major reforms to Ontario's retirement system, including laying the groundwork for the enhancement of the Canada Pension Plan.



Nora Beatty is the Director of People Operations at Common Wealth. She is passionate about people and connecting innovative people strategies to better business outcomes. Nora's journey in HR started at Oracle, and since then she has had the opportunity to join some of the most exciting tech companies and start-ups in the city. Before joining Common Wealth, Nora built out and led the People function at Hubdoc, and supported the deal team during the acquisition by Xero. Post-acquisition, Nora took on a broader operations role, supporting some of the GTM initiatives, while also leading the People function.

Five Good Ideas

1. Make the business case for employee financial health (HINT: it's not just "nice to do")
2. Take advantage of Tax-Free Savings Accounts
3. Keep fees low
4. Provide education on accessing government benefits
5. Make savings automatic

Resources

- Healthcare of Ontario Pension Plan, Common Wealth and the National Institute on Ageing, "The Value of a Good Pension: How to improve the efficiency of retirement savings in Canada" (2018).
- John Stapleton, Open Policy Ontario, "Toolkit: Low Income Retirement Planning" (2020).
- Larry Bates, "T-Rex" fee calculator.
- Prosper Canada, Financial Relief Navigator.
- Ontario Securities Commission



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FIVE GOOD IDEAS

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Edited by **ALAN BROADBENT AND RATNA OMIQVAR**

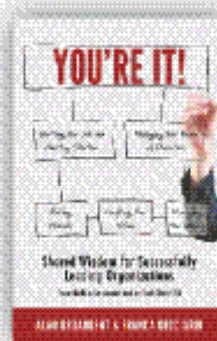
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