

Benefits of a group plan

Help business owners understand the benefits of a group plan

Business owners have a lot on their plate: overhead costs, customer satisfaction, marketing, distribution, sales, and most importantly, their employees. Attracting and retaining top performing employees is a key contributor to business success. But before employers implement a plan, they often face challenges and roadblocks that prevent them from getting started.



Time: Most business owners are inundated on a daily basis and find it very difficult to set aside time to put the right plan in place. Help business owners understand the importance of a group plan and how it can impact their business in a positive way.



Plan type: Business owners struggle with choosing what type of group plan to implement. B2B Bank Dealer Services offers a wide variety of account types to choose from to suit the needs of both the employer and employee.



Education: In most cases, business owners are champions of group plans, but not investment experts. You can help advise your clients on an account type best suited to their business need.



Administration: Data entry of reoccurring payroll deductions and one-time bonus payments can be time consuming and redundant, but our online Group Access portal makes it easy and convenient to perform these administrative tasks.

Group plans can be an important and valuable addition to any employer's overall compensation plan, while affording you an excellent opportunity to provide investment services to businesses and their employees. Once you have established a good relationship with employers and employees, you build retention and loyalty, as group accounts typically do not switch advisors while the assets continue to grow year after year.

Key benefits of our Group Plan program:

- Convenient, online group remittance process
- Employers can choose from a wide variety of account types, including Group RRSPs, Group DPSPs, Group TFSAs, and Group non-registered investment accounts
- Access to third-party fund companies and other products such as GICs

Group Access

B2B Bank Dealer Services Group Access provides secure online access for group plan sponsors to simplify day-to-day management of group plans.

Group plan employers have convenient access to open and create, edit and save regular remittances, and add new members. In addition, plan sponsors can assign multiple administrators, each with individual access rights and privileges, providing added security and transaction controls.

For clients who don't have an account with B2B Bank Dealer Services, take advantage of our Transfer-in Program (T.I.P.).

B2B Bank Dealer Services pays up to \$175 towards the cost of transferring out from your client's current financial institution.¹

Talk to your BDM today

If you're interested in learning how B2B Bank Dealer Services can help you grow your business, talk to your Business Development Manager, call Client Services at **1.800.387.2087** or visit **b2bbank.com/dealerservices**.

¹Some conditions apply – for full details speak to your Business Development Manager. B2B Bank Dealer Services includes B2B Bank Financial Services Inc. (Member of the Mutual Fund Dealers Association of Canada (MFDA)), B2B Bank Securities Services Inc. (an IIROC member, Member – Canadian Investor Protection Fund) and B2B Bank Intermediary Services Inc. (an AMF – regulated dealer operating in Quebec). B2B Bank Dealer Services does not endorse or promote any investments products, programs and strategies. This document is intended for licensed financial advisors exclusively and is for information purposes only. B2B Bank is a trademark under license.