



Email – Default Unregistered



It's time to review your investments

Hi <%= recipient.firstName %>,

We noticed that a large portion of your <%=targetData.PlanName_EN %> savings are still invested in the starter fund. This fund is designed as a temporary starting point. If you didn't actively choose it, it may not be the best fit for your long-term goals.

To help ensure your savings are working for you, it's a good idea to check in on your investments. One key strategy is diversification. Spreading your money across different types of investments can help reduce risk and smooth out market ups and downs.

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Need help with your investment portfolio?

Call 1-866-634-4840 to talk to a Financial Services Consultant* today.

* Registered as financial security advisors in Quebec

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Email – Too Conservative Unregistered



It's time to review your investments

Hi <%= recipient.firstName %>,

We noticed you're investing a large portion of your <%=targetData.PlanName_EN %> money in lower-risk funds. This might be right for you. But if you're still early or mid-career, you can consider reviewing your portfolio's long-term investment risk to ensure it aligns with your goals.

No one can predict how investments will perform. But you can take steps to help keep your savings on track. Diversification is one of the most effective strategies. By holding a mix of investments, you can help reduce risk and protect your savings from market ups and downs.

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Email – Too Aggressive Unregistered



It's time to review your investments

Hi <%= recipient.firstName %>.

We noticed you're investing a large portion of your <%= targetData.PlanName_EN %> money in higher-risk funds. This could be right for you. But as you near retirement, now might be a good time to check if your investments still align with your evolving goals.

You may want to consider gradually reducing your investment risk to help protect the savings you've worked hard to build. Small adjustments today can help you feel more confident and secure in meeting your retirement income needs.

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Email – General Unregistered



It's time to review your investments

Hi <%= recipient.firstName %>,

You know the value of saving because you've already enrolled in your <%=targetData.PlanName_EN %>. It's also a good idea to review your investment mix from time to time. That way, you can make sure it still matches your comfort with risk and supports your savings goals.

While no one can predict the markets, there are steps you can take to help manage risk – like diversifying your investments. By holding a mix of investment types, you can help smooth out market ups and downs and better protect your savings.

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Hello %DISPLAY_FIRST_NAME%



This investment strategy can help protect your savings and keep you on track to meet your goals.

[Tell me more](#)[No, thanks](#)

Stay confident with a well-balanced portfolio

Markets can go up and down, but your strategy doesn't have to change with them. **One key strategy is diversification.** A well-diversified portfolio can help reduce risk and protect your savings from market changes.



Are your investments still aligned with your goals?

It's smart to check in on your portfolio. Your comfort with risk and your goals may change over time, and your investments should reflect that.

The **Asset Allocation tool** can help you find the right investment mix for your goals. It lets you explore different fund types, risk levels, and strategies.

[Review my investments](#)