

Plan your retirement

We're here for you, now and in retirement

If you're over the age of 50, it's not too soon to discuss your retirement-income goals.

And, if you're close to retirement, now's the time to start planning the specific steps for your best years ahead.

Instead of planning to automatically transfer your assets to another financial institution before sailing into retirement, talk to us first.

As your Group Retirement and Savings Provider, we can add a lot of value. Our expert team of Retirement Specialists can help to make planning easy and straightforward.

Together, we'll assess your personal situation - and how it aligns with your retirement plans - to get a sense of your required monthly income.

From there, we can show you in-depth retirement projections to help you select an ideal retirement date and help you determine when to officially activate your retirement income.

Along the way, we'll explain the differences between the income options that are available, so you feel informed in making the right decisions for your long-term financial interests.

Because you're a valued member of a Co-operators/CUMIS group retirement and savings plan, converting your retirement savings into a tax-effective income solution just got easier!

While you've been working hard to earn your retirement, we've been working hard to grow your investments. And that personalized support won't change when you continue to partner with us throughout your retirement.

You'll continue to enjoy exceptional service.

You'll enjoy an income/spending plan that supports your goals.

And, because you're already a client, you'll enjoy the convenience of us doing the heavy lifting!

That lets you get straight to the good stuff:

A happy, stress-free retirement.