



Financial Health Support for Employees

Since March 2020, the world's stock markets have mimicked a scary roller coaster because of the Coronavirus pandemic. This comes as no surprise to anyone. However, with the right guidance from a financial planner like a *Financial Health Specialist*, an "action plan" could make a big difference in boosting retirement portfolios.

Options and support to help you navigate financial success

Our benefit consultants at Green Benefits Group offer all employees a complimentary financial support service, which is a great opportunity for you to ask any questions you may have about your savings.



Meet **Trevor Kearns**. Trevor has been in the financial services industry for almost two decades. Having worked for a number of banking institutions in numerous customer-facing roles, Trevor brings a vast amount of knowledge and experience to financial planning. He earned his Certified Financial Planner® (CFP) designation in 2012 and uses his financial planning expertise to give every mortgage client their full financial picture and find the best product for their financial goals.

Recently, Trevor recorded a presentation that is conveniently available to watch via YouTube:



<https://youtu.be/0aGrIqRYCyl>

Trevor's presentation shows you how simple – yet perhaps unfamiliar – tactics can save you more money, which can then be reinvested into more effective ways to grow your wealth.



Initially, Trevor illustrates the importance of choosing the right financial path (budgeting, knowing where your money is going, saving, investing, etc.). You also have the opportunity to work independently with Trevor on your own personal goals, so he can create tailored solutions and improve your overall financial outlook.

Regardless of your age, now is a great time to review your portfolio

Getting closer retirement? Or maybe 10+ years away? It's never too late to learn more and maximize your funds, especially during this unprecedented year. Since it is impossible to predict the markets (and if your retirement is within the next 5-10 years) it is important to structure your portfolio to align with your individual risk tolerance. For the younger demographic, it is a bit different because you have time on your side to grow your investments. Ironically, market volatility can provide a great buying opportunity. The buying opportunities for portfolio managers is greater when planning earlier in life and the key is to have someone help you diversify your funds for maximum gains.

Trevor's Helpful Links to Get Started:

Online Mortgage Application - application.malink.ca

My Mortgage Planner App - www.maapp.ca/app/trevor-kearns