

LAWYERS | FINANCIÈRE
FINANCIAL | DES AVOCATS

CBIA / Lawyers Financial

Dawn Marchand, President & CEO (Interim)

Natalie McGrath, Marketing Specialist

FOLA

November 2019



CBIA | AABC

Investment & Insurance Solutions

exclusively for lawyers, their families and employees

- ┐ Not-for-profit ... we measure success in satisfied clients, not dollars.
- ┐ Run for and by lawyers ... 12-member volunteer Board of Directors of lawyers from across the country.
- ┐ Highest quality insurance and financial products at the very best rates.

Comprehensive Suite of Financial Solutions

INSURANCE

- └ Life
- └ Critical Illness
- └ Disability / Business Expense
- └ Health & Dental
- └ Employee Benefits
- └ Commercial Office
- └ Home & Auto
- └ Travel

INVESTMENTS

- └ Investment Funds
- └ Guaranteed Interest Products
- └ Individual & Firm Plans
 - RRSPs
 - TFSAs
 - RRIFs
 - Non-Registered Accounts
 - DC Pensions

Premium Refund

We just gave back \$3.5 million to eligible insureds.

Not-for-profit means sharing success!

- Employer benefits
 - Reduced costs, risks & administration
 - Eliminates compliance and fiduciary risks
 - Compelling talent attraction and retention
- Employee benefits
 - Guaranteed lifetime pension
 - \$8 in benefits for each \$1 contributed
 - Inflation protection and survivor benefits
 - No complex investment decisions
 - Consolidate existing registered funds
- Launch date: mid 2020

For more info:
lawyersfinancial.ca/pension



Defined Benefit Pension Plan for Law Firms

