

CHEAT SHEET

Stats on financial wellness programs

We regularly run surveys on our client base to get up-to-date insights on employee concerns at Canada's most cutting-edge companies.

We surveyed 500+ Wealthsimple customers in October 2024, the majority:

- Being between 25 - 40 years old
- Earning between \$50,000 and \$150,000
- Working in tech, government, financial services, healthcare, or retail



65%

feel stressed about their finances

1 in 3

say it impacts their productivity at work

50%

of employees under 35 will leave their job in the next 24 months

90%

note employer financial benefits are important to them

91%

are more committed to employers that provide **great** financial wellness

Top savings goal by age range



25 & under: trips



25-35: home



26-45: home, then traditional retirement



46-55: traditional retirement



56+: early retirement



Top sought after features for a financial benefits program

- A larger employer contribution
- Ability to contribute to an RRSP
- Simple and intuitive user experience
- Ability to contribute to a TFSA
- Ease of access to funds



Want to discuss your financial wellness program?

Get in touch at wealthsimple.com/for-business.

