**Sample letter for your employer**

Subject line: Request to review retirement plan

Dear [HR Leader First Name],

As an employee at [Company Name] for the past [X] years, I believe bringing in a new type of pension plan as part of our total rewards package would greatly benefit employees like me and contribute to the overall growth and success of [Company Name] through improved employee engagement, loyalty, talent attraction and retention.

I wanted to bring to your attention a modern defined benefit pension plan from CAAT Pension Plan, a not-for-profit trust fund established in 1967. CAAT’s DBplus pension plan offers valuable benefits both organizations and employees are looking for:

|  |  |
| --- | --- |
| Benefits for employer | Benefits for employees |
| * **Cost certainty** and fixed costs * **No liabilities** or fiduciary risk * All plan administration and investment management included at **no cost** * Move to DBplus can be the achieved **without any increase in costs** – lift and shift our existing plan into DBplus * Help **attract and retain top talent** * L**ess turnover and improved productivity** saves money * Enhances culture and **employee wellness** | * Secure, predictable **lifetime retirement income** * **Reduced stress** and risk * **No investment decisions** * **Inflation protection** * **Survivor benefits** |

Additional information is available at [pensionsmatters.ca](https://www.caatpension.ca/pensions-matter/en/) and within the attached brochure *Advantages of a Modern Pension Solution DBplus*. These sources also include contact information for CAAT’s pension experts.

Thank you for considering the possibility of exploring DBplus for our organization.

Sincerely,

[Your Name]