



The **Financial Education**  
Institute of Canada



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The Financial Education Institute of Canada**

## **The University of Western Ontario Works with the Institute to Educate Employees on Retirement**

The University of Western Ontario and The Financial Education Institute of Canada have announced an agreement to work together to educate employees approaching retirement. The decision followed several months of careful examination of available alternatives.

“We really want to help our retirement plan members understand their investment options and make strong decisions based on their own needs,” said Martin Bélanger, Associate Director of Retirement Plans. As part of an ongoing program, the university will host onsite seminars as well as distribute personalized study books prepared by the Institute and provide its 6,300 employees access to a comprehensive retirement curriculum through the Internet.

“The new services represent an investment in our member’s education needs around their finances. Our task over the next few months is to educate pension plan members about these new services and encourage all members to give them a try,” added Mr. Bélanger.

Graydon G. Watters, President of the Institute was impressed with the thoroughness of the university’s research. “The university was very diligent in their analysis. I am pleased that they have endorsed the work the Institute does in the group retirement industry. We have been providing onsite educational seminars, textbooks and online learning for many years and it is great to be recognized by such a prestigious organization. UWO is the second Ontario university to establish such a working relationship with the Institute.”

“You could say we did our homework,” Bélanger said. “We looked at many possible solutions. What we liked best about the Institute was the fact that they are true specialists who do nothing but financial education.”

As part of the collaboration, the Institute has added new modules to its seminars and its online curriculum to address retirement income options recently made available under the university’s retirement plans.

“We have our own unique needs,” added Bélanger, “and the Institute has the flexibility and expertise to develop custom material for us.”

“In the end, everyone benefits. Satisfying the university’s requirements helps us to offer expanded educational services to other employers in similar circumstances,” noted Watters. The agreement kicked off when the online curriculum went live in July, followed by onsite seminars that commenced in August.



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## **About the University of Western Ontario**

Founded in 1878, The University of Western Ontario is one of Canada's oldest universities and today is committed to its mission of providing the best student experience among Canada's leading research-intensive universities. A vibrant centre of learning, Western is home to approximately 3,500 full-time faculty and staff members and approximately 30,000 undergraduate and graduate students. Through its 12 Faculties, and three affiliated Colleges, the University offers more than 400 different majors, minors and specializations. Research is an integral part of the University's mission and external support for research projects totals exceeds \$200 million per year. Western is located on 155 hectares of land along the banks of the Thames River in London, Ontario - a thriving city of 432,451 people, 200 kilometres west of Toronto.

## **About The Financial Education Institute of Canada**

The Financial Education Institute of Canada traces its roots back to 1984 when Graydon Watters founded Financial Knowledge Inc. to publish specialized financial planning books. Recognizing a growing need for comprehensive and unbiased financial information, he left a successful career in the world of retail investments and financial planning to develop the educational materials that no one else was offering. Since then, his books, seminars and planning tools have helped thousands of Canadians to achieve a realistic understanding of what financial success is all about. Building upon the foundation of traditional books, seminars and workshops, the Institute currently offers employee education through a comprehensive online curriculum comprised of over 30 lessons on a diverse range of money and life topics. The Institute's holistic approach encourages individuals to recognize that their future financial security is in their own hands. By engaging in the Institute's simple process, employees can make the most of the group plans available to them – and plan sponsors can know they have followed best practices in meeting their fiduciary responsibilities.

The Institute operates only on a fee-for-service basis. It does not sell financial products, nor does it receive any commissions. Its only business is education.

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