

Your retirement planned well

Take our 3.5 minute questionnaire to get your free retirement and financial plan.

Start now

What our users are saying



Patrick

"I love that they make financial plans for you and actively are helping you to grow your wealth as a result. It's a lot different compared to other financial advisory firms that once they have your money, don't really seem to care about you."



Leisse

"As a single woman with a gaggle of children – who used to absolve herself of all financial responsibility – I can't express the feeling of joy that comes from feeling of creating and embracing my own wealth and financial security. Grateful guys, thank you."



Olivia

"What I loved the most was seeing the big picture of my financial life. It was eye-opening how insurance and investing can work together to position me and my family for a better financial future."



Veronique

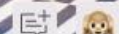
"Out of all the financial companies, you were the only one who took the time to give me all the mortgage information I needed."

About Planswell

Planswell is a small but mighty start up that is passionate about financial planning and advice.

Our dream and mission is to create a world where everyone has access to financial education and piece of mind.

That's why we partner with financial advisors all over Canada and the United States to help us on our mission to making financial planning and advice accessible to everyone.



No notes yet



HAVE QUESTIONS?

Frequently Asked Questions

- + How do you keep my personal information safe?
- + Can I implement these plans without an advisor?
- + How much does this cost?

Do something nice for your future self

+ How much does this cost?

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hello@planswell.com

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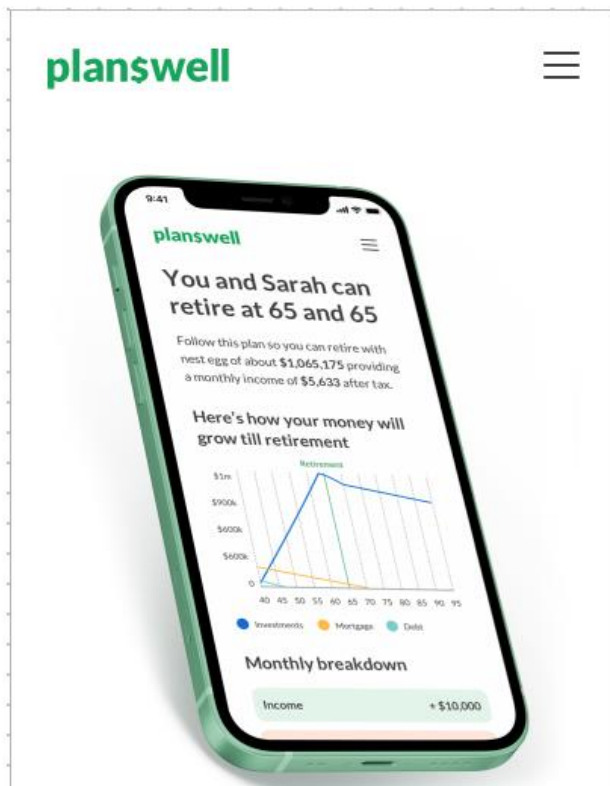
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MOBILE VIEW



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What you'll get from your free financial plan



Retirement age and income

Our engine predicts what your total savings at your retirement age (nest egg) will be based on your desired retirement age, current savings, contributions and risk tolerance. The engine divides this nest egg across your retirement to the age of 95 to predict what your monthly income will be.



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Debt plan

The engine tallies up your debt and finds ways to consolidate your debt to the lowest interest rate and free up your cashflow. Many people are surprised to see lower monthly debt payments!



Investment plan

The engine recommends how much money to put toward your TFSAs and RRSPs. It also takes into account how to optimize payments so you save money on taxes.



Insurance plan

Any good financial plan includes insurance. The engine recommends how much insurance you need to protect your future income in the event that you pass away or become critically ill.



Advice from advisors near you

Every plan has access to free expert advice from financial experts that live near you. Your financial expert can help you with things like:

- Making sure your plan fits your needs and lifestyle
- Increasing cashflow
- Building wealth
- Getting you the best insurance rates

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Frequently Asked Questions

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