



**bridgewell**

## Benefits Alliance Announces Bridgewell Financial as New Member.

CONCORD, September 7, 2023

Benefits Alliance is proud to announce that Bridgewell Financial (Bridgewell) has been selected as a new member firm. Benefits Alliance is a leading voice in the group benefits sector across Canada and their preferred solutions and pricing, unique product mix and Knowledge Library are tools that Bridgewell looks forward to utilizing to help its clients achieve financial wellness in all aspects of their lives.

"I am very pleased to welcome Michael Wortsman and the Bridgewell Financial team to Benefits Alliance. With their focus on bridging the gaps between all areas of wellness – mental, physical, community and financial, I know our organization will appreciate the value Bridgewell brings to BA," said Carolyn Eagan, President of Benefits Alliance. "As a young and growing firm that has evolved significantly as a 2nd-generation business, there will be many aspects that our members will learn from and share back with Bridgewell. This is a great fit for us all, as we are an association that fosters professional development and collaboration among group benefits and pension-focused advisors."

Bridgewell is committed to helping its clients achieve financial wellness in every aspect of their personal and professional lives. That means being a key part of their decision-making process, bridging gaps and proactively delivering dynamic ideas and planning options. They use fact-based insights, the latest technology platforms and integrated strategies, all while highlighting financial considerations that often go overlooked or under-served.

"We're honoured to be recognized alongside such an elite group of firms from across Canada," said Michael Wortsman, Group Benefits Partner, Bridgewell Financial. "We believe this exciting membership will create new opportunities for our team to provide an enhanced experience to Bridgewell clients. BA's preferred solutions, pricing and thought leadership will be a real asset as we continue to grow our organization."

### **About Bridgewell Financial**

Bridgewell delivers insurance, wealth and financial planning, group benefits and executive planning and benefits solutions to organizations and individuals. Their multi-disciplinary advisory team combines responsiveness and dependability with a focus on purpose-driven planning. The goal is to fill the gaps in their clients' financial foundation using the latest data analysis and digital platforms, helping them make financial decisions with purpose and clarity.

### **About Benefits Alliance**

Benefits Alliance includes independent member firms and more than 200 advisors nationwide. We leverage our size and experience to offer our group clients a qualitatively superior experience. We work intimately with our clients to create plans that are innovative and flexible, delivering cost-effective stability for our clients.



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