ADVISOR USE ONLY

GET BACK TO BASICS – THE FUNDAMENTALS OF UL

For clients, having freedom in retirement is about knowing they can cover costs, take care of themselves and enjoy their time. It's about understanding the risks, being prepared for emerging needs and planning a legacy – while having enough money to last. It's all a part of **Money for Life**.

ONE WAY IS WITH UL

A large segment of your clients can benefit from the unique features of universal life (UL) insurance. And Sun Life Financial has a new product: **SunUniversalLife II**.

Clients are looking for options to meet their financial needs and goals. UL's distinctive combination gives permanent life insurance protection for lifelong peace of mind, with a broad range of investment account options for tax-preferred savings growth. Show clients the benefits of UL insurance: flexibility, choice and an all-in-one protection solution that can help build their savings.

MONEY FOR LIFE RESOURCES THAT CAN HELP

Here are a few resources to help start the conversation and to learn more about **Money for Life**.

- **Money for Life: Basic needs course** – Available on Education Hub to learn more and earn CE credits.*
- **Let's talk about your retirement** – A brochure for retirement-ready clients to start talking about Money for Life and retirement risks and needs.
- **Video: Protecting your wealth with insurance** – Asks viewers to re-think insurance by showing how it can both preserve and enhance wealth.

? WHO'S LOOKING FOR UL?

Clients and investors who:

- need permanent, flexible protection that can maximize tax-preferred growth opportunities.
- are building their savings and want to supplement retirement income.
- want protection with asset diversification and a "hands-on" approach to allocating the investments in their policy.
- own a business and need a tax-efficient way to protect the value of their business with permanent protection and cash flow flexibility.
- are parents and grandparents creating a financial foundation and enhancing their estates for children and grandchildren.

START WITH A MONEY FOR LIFE CONVERSATION

What are your retirement goals?

Will you want or need to continue investing for future growth?

Is it important to you to leave a legacy?

How do you want to be remembered?

Get all the details you need about the new **SunUniversalLife II** on sunlife.ca/advisor. When you're ready, you can easily show clients the benefits of UL on our new, industry-leading Sun Life illustration system.

WE'RE HERE TO HELP

To learn more about Money for Life and SunUniversalLife II, talk with your Sun Life Financial sales team.

*Don't have access to Education Hub? Register now. To register, you must have placed business with Sun Life Financial in the past.

Life's brighter under the sun

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