



# MONEY FOR LIFE MONTHLY COMMUNICATION

ADVISOR USE ONLY

## LIFE DOESN'T FOLLOW A SCRIPT

But, following a written financial plan can help your clients reach their goals and retire with confidence.

It's all part of **Money for Life** – Sun Life Financial's customized approach to financial and retirement planning.<sup>1</sup> The **Money for Life** approach adapts to Canadians' changing needs, regardless of where they are now – even if they don't have a plan yet.

### THE OPPORTUNITY

The **Money for Life** national television ads resonate with Canadians, increasing their likelihood of working with an advisor for the long term.

But **Money for Life** is more than just a commercial. It offers a conversation framework to get clients talking about their short- and long-term goals, and thinking about how their needs will change over time. Supported by a suite of tools and resources, this approach can help you:

- connect with clients,
- have meaningful, needs-based conversations, and
- present the right mix of life, health and wealth solutions.

### RESOURCES TO HELP YOU GET STARTED

- [Money for Life campaign video](#) – Created specifically to use in meetings with prospects or to send to your clients through a [prospecting email](#).<sup>3</sup>
- [4 ways to start the conversation](#) – “Happily ever after” looks different to each of your clients; use the four resources highlighted in this 1-pager to get them thinking about planning for their future with **Money for Life**.
- [Money for Life overview presentation](#) – Watch this short Brainshark to learn about, or refresh your knowledge of **Money for Life**, the **Money for Life** - your changing needs visual and our approach to planning.
- [Money for Life - Overview fact sheet](#) (810-4280) – Use this 1-page overview to prepare to have a conversation about **Money for Life** with your clients.

### WE'RE HERE TO HELP

Find the full suite of **Money for Life** marketing materials, market research, resources, Sun Life Financial Bright Papers and industry white papers on [www.sunlife.ca/moneyforlifeadvisor](http://www.sunlife.ca/moneyforlifeadvisor).

To learn more, talk with your Sun Life sales team or email [sst@sunlife.com](mailto:sst@sunlife.com).

<sup>1</sup> Only advisors who hold CFP (Certified Financial Planner), CH.F.C. (Chartered Financial Consultant), F.Pl. (Financial Planner in Quebec), or equivalent designations are certified as financial planners.

<sup>2</sup> 2015 Sun Life Canadian Unretirement index

<sup>3</sup> Send emails to clients and prospects only if they've previously provided express consent to receive commercial electronic messages from you.



### ? DID YOU KNOW?

- Over one third (36%) of Canadians think there's a serious risk they could outlive their retirement savings.<sup>2</sup>
- Fewer than half (47%) feel they have the financial knowledge to make a plan for retirement.<sup>2</sup>
- Only 50% are able to put a number on how many years of retirement they think they'll have.<sup>2</sup>

**Despite all of this, just 33% of Canadians work with a financial advisor.<sup>2</sup>**

## Life's brighter under the sun

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**MONEY FOR LIFE**