

What's on your mind?

Identifying your financial concerns



What are you worried about?

Please take a moment to review the topics and related questions. Check off any concerns you have right now. I can help you with your questions, and where more specialized information is required, we can talk about which type of professional you should speak with.

- Will my money last through retirement?
- Do I need long term care insurance?
- How do I manage my retirement plans at various financial institutions?
- What should I do with my employer-sponsored pension plan?
- What are the implications of spending a significant amount of time out of my home province?
- How will I spend all of my free time in retirement?
- What's the best way to withdraw money from my registered retirement savings plan (RRSP) or registered retirement income fund (RRIF)?
- When should I start receiving Old Age Security (OAS) and Canada Pension Plan (CPP)?
- How do I budget for my retirement years now that I'm no longer earning an income?

Education planning

- How much do I need to save for my child or grandchild's education? When should I start?
- What are some of the best ways to save for an education?
- What's the Canada Education Savings Grant (CESG) program and does my child qualify?

Financial basics

- What's the best way to keep my records safe and organized?
- How can I do a better job of budgeting to reduce my debt now and save for the future?
- What are some effective ways to teach young children about the value of money?
- How do I help a young adult establish a financial strategy?
- When's the best time to introduce my child to my financial advisor?

Life events

- What do I do when a loved one dies?
- I'm getting divorced. What type of professional should I speak with?
- I'm getting remarried. What's the best way to manage our finances and structure our assets?
- My child is graduating from university. How do I help her/him get a good start on her/his next steps in life?
- I'm a grandparent for the first time. What can I do to help set up my grandchild's financial future?

Estate planning

- How do I start the conversation and prepare my family regarding my wishes if I become incapacitated or die?
- Will my family be secure if something happens to me?
- How do I create a legacy for my children and ensure there's no conflict among them after I'm gone?
- What type of professional can help me protect my estate from taxes and creditors?
- How will my spouse cope when I'm gone?
- Why is it important to have Power(s) of Attorney and Executor(s)?

Elder care

- What type of professional should I speak with to understand what to look for in an extended care facility?
- What are my options if my parents don't have the financial resources to live in a private nursing facility?
- What type of professional should I speak with to learn about available government programs?

I want to know more about...

About us

Sun Life is a leading international financial services organization. In Canada, we started selling life insurance in 1871. Since then, our commitment to helping people achieve lifetime financial security through market-leading products, expert advice and innovative solutions has made us a household name – a name that people trust.

Life's brighter under the sun

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