Sun Life | Consulting

We help. You grow.

Brand one-pager

The Brand one-pager is a tool you can use to introduce clients to your mission, values, team, and process. Creating one helps inspire confidence and build trust because clients will know what to expect when working with you.

You can use your Brand one-pager in all client touchpoints and to support your marketing strategies. Here are some ideas on how to share it:

- Send it before or after a first meeting with new prospects.
- Offer it as a tool for your referral partners to use when positioning you to their network.
- Re-introduce your team to clients and remind them of your mission.
- Incorporate it on your website.
- Feature it on your LinkedIn profile or company page.
- Format it as a PowerPoint slide to include in a presentation or webinar.

How to use this tool

Option 1: Complete the fillable template with personalized descriptions of your business and team. Here's how to save the template as a PDF:

1. Save the PDF you filled out.
2. Go to "File" > "Print".
3. Change Printer or Destination to "PDF".
4. Type the page number you want to save.
5. Click "Print" to export the page.

Note: you will be prompted to re-save the file. Save it with a different file name than what you saved it as in step 1.

Option 2: Use this template as guide and build your own version following your brand guidelines.

Need help writing more compelling descriptions or applying your brand guidelines? Hiring a professional copywriter and graphic designer can take your Brand one-pager to the next level.

Sun Life

Financial
Company

Aspiring to create wealthier Canadians

Mission: To help Canadians keep more of the wealth they accumulate.

The value of an estate often erodes by hidden expenses during intergenerational wealth transfer. We help build estate strategies that ensure more wealth transfers smoothly to the next generation.

John Maxwell, CFP®, CLU®, FEA

President & Founder, Financial Company
John@financialcompany.com | 905-123-1234

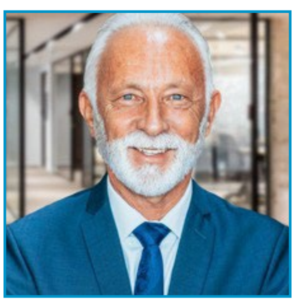
- Discusses your objectives and defines a strategy, in partnership with our insurance partners, to deliver comprehensive estate and tax planning advice.
- Consults with your other trusted financial partners, including your lawyer and accountant, to help design and tailor plans specifically for high-net-worth clients and business owners.

Ling Chen, CPA, CLU®

Associate Advisor, Financial Company

Ling@financialcompany.com | 905-234-2345

- Assists in case development and file preparation for John Maxwell.
- Generates illustrations for complex insurance strategies and corporate-owned life insurance for business owners.
- Brings extensive background as a Chartered Professional Accountant (CPA).



Mike Juno, LLQP

Marketing Assistant, Financial Company

Mike@Financialcompany.com | 905-354-3456

- Prepares meetings and provides support for Platinum Financial, including compiling life insurance and investment reporting, and producing illustrations for life, critical illness and disability products.
- Compares product scope and pricing through the use of 3-option graphs.
- Supports new business and investment processing to ensure a streamlined experience for clients.

*For illustration purposes only.

LOGO

Team Company Name

Tagline:

Mission:

Brand story:

TEAM PHOTO

HEAD SHOT

Name, Designations

Title
Phone/Email

- Partners with...
- Consults with...
- Leads...

HEAD SHOT

Name, Designations

Title
Phone/Email

- Partners with...
- Specializes in...
- Manages...

HEAD SHOT

Name, Designations

Title
Phone/Email

- Administers...
- Facilitates...