Beyond the Client worksheet

Date last reviewed: ______________________ Reviewed with: ______________________

How to use this worksheet

Step 1: Complete the worksheet for a Client you work with. Add names and any other relevant information (company, phone numbers, address, etc.).

Step 2: Reflect on what gaps exist. Think about how you can ask for an introduction to these key contacts and what value you add.

Step 3: Identify the solutions, strategies, and products you would recommend for each of the Clients' key relationships.

Step 4: Transfer relevant info into your Client relationship management program (e.g. Salesforce) so you can automate future opportunities and reports.

Executor or power of attorney

Lawyer/notary*

Parent

Accountant*

Client

Spouse/common-law partner

Business partner or operator

Adult child/dependent

Other

Minor child/dependent

Grandchild

*Advisors must follow all regular compliance and privacy rules before contacting the Client's external professional advisors or discussing any Client information with them. Advisors and Sun Life Assurance Company of Canada do not provide legal, accounting or taxation advice to Clients. Before acting on any recommendation or suggested action, Clients must seek advice from a qualified professional, including a thorough examination of their specific legal, accounting and tax situation.

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