

# Sales strategies overview: corporate

1

## Insurance need

All sales strategies start with a life insurance need, like protecting the value of a client's business to help them enhance the legacy that they can leave to future generations.

2

## The client's goal

Each sales strategy can help clients achieve specific financial goals. Determining what these goals are will help you position the most appropriate strategy.

### Transfer

- Satisfy corporate insurance need without giving up liquidity in existing portfolio
- Minimize corporate tax burden associated with taxable investments
- Enhance the corporation's value at death for future generations
- Diversify corporation's asset mix



**Corporate asset transfer strategy**

### Access

- Enhance the corporation's value at death for future generations
- Access assets to supplement business income, if needed
- Minimize corporate tax burden associated with taxable investments



**Corporate retirement strategy**

### Protect

- Maximize the corporation's value at death for future generations
- Minimize corporate tax burden associated with taxable investments
- Provide additional tax-preferred ways of increasing the corporation's value



**Corporate investment strategy**

3

## Death benefit

The tax-free death benefit is paid directly to the corporation, allowing clients to use the corporation's capital dividend account to help them enhance their legacy and achieve their financial goals.

**We help.** By providing a flexible and simple solution with growth potential.

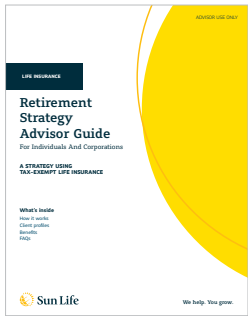


**You grow.** Through your commitment to meeting clients' changing needs.



# Next steps

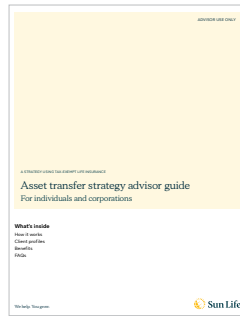
## Advisor guides



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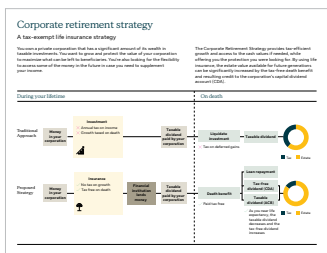


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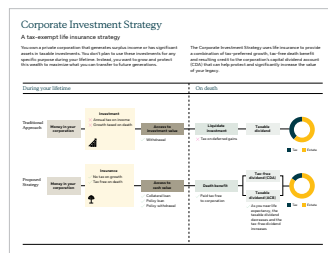


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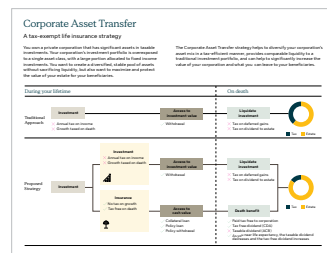
## Sales strategies



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