Business Planning Overview

Conversations for every stage of your business growth

As your business moves through **survival**, **growth** and **maturity** stages, your planning focus will shift, as will the conversations you have with your advisor.

Survival

Personal planning

Risk management

Premature death Will Disability Critical illness

Retirement planning

Registered plans Asset allocation Non-registered savings plans

Other savings goals

Children's education Home purchase Tax minimization

Business continuation planning

Key person protection

Premature death Critical illness

Buy-sell agreement

Premature death Retirement Disability Critical illness

Business loan protection

Executive benefit planning

Estate planning

Will planning

Maturity

Estate equalization Family law

Tax planning

Estate maximization Estate freeze Share redemption Liquidity

Trust planning

Family trusts Spousal trusts "Self-settled" trusts

Philanthropy

Planned giving

Business succession planning

Ownership transition

Sell or liquidate
Estate equalization
Retain in family
Successor training
Successor buy-sell
agreement

Management transition

Powers of attorney

Retirement income planning



We help. YOU GROW.

Sun Life Assurance Company of Canada is a member of the Sun Life Financial group of companies. © Sun Life Assurance Company of Canada, 2019.