

Agenda

September 13th, 2021



Host: Nicholas Pateras
Insurance Sales Representative

Welcome and opening JAY MORROW - Director of Sales	1:00–1:05pm ET
Sun Life's roadmap in a digital world: Advisor site revamping and Sun eApp evolution MICHELLE NELLES - Director, Digital Advisor Experience ANDREW MCGOUGH - Product Owner, Individual Insurance Sun eApp	1:05–1:45pm ET
Our business building digital journey SHERRY XIE - MBA, CLU, Director, Strategy & Operations	1:45–2:05pm ET
Sun Retirement Health Assist – product overview* LIANE GOULET - Director of Health Product Management, Individual Insurance	2:05–3:05pm ET
Breakout sessions Pick one session (options in both English and Mandarin)	3:05–3:35pm ET
The direction of new business and underwriting NORM LEBLOND - FALU, Vice President, Chief Underwriter and Claims Risk Officer JAY SANKOFF - AVP, New Business and Underwriting – High Net Worth Markets	English option
新业务及核保方向 SHERRY YANG - Director, Advanced Underwriting	Mandarin option
Break	3:35–3:45pm ET
Breakout sessions Pick one session (options in both English and Mandarin)	3:45–4:45pm ET
Millennials: The future of wealth* DANIELLE WILLIAMS - Director, Business Development	English option 1
千禧一代: 财富的未来 * YUSUDAN REN - CFP, Pl. Fin. Regional Sales Director	Mandarin option 1
Put a ring on it: Converting prospects into lifelong Clients* DANIELLE WILLIAMS - Director, Business Development	English option 2
锤定音: 将潜在客户转化为终身客户 * YUSUDAN REN - CFP, Pl. Fin. Regional Sales Director	Mandarin option 2
Shining offline! Remember how? JULIE BLAIS COMEAU - Chief Etiquette Officer	4:45–5:25pm ET
Closing remarks JAY MORROW - Director of Sales	5:25–5:30pm ET

*CE accreditation for this presentation varies by province