Sun Life

Independent Insurance Distribution – Central Southwest & Atlantic Region

Sun Life Webinar Series

Webinar outlines

April 7th, 2022 10:00 AM – 11:00 AM EST	**Life Insurance and the Wealthy** Presenter: Lidia Pirrie, Regional Sales Director & Nicholas Pateras, Insurance Sales Representative Join us as we bust two common myths about insurance for the wealthy: 1. The Wealthy don't need insurance, and 2. Insurance is a bad investment Studies show the wealthy prefer to hold a lot of safe assets to protect their capital. Diversifying with insurance can improve the efficiency of their portfolio. (1 CE Credit) Register
April 21st, 2022 10:00 AM – 11:00 AM EST	**Investment Strategy** Presenter: Lidia Pirrie, Regional Sales Director & Nicholas Pateras, Insurance Sales Representative Learn how clients with excess income or assets, can use an exempt life insurance policy to maximize the value they can transfer to their beneficiaries. Traditional investments: • may be taxed during accumulation and at death • are subject to estate settlement costs and delays • are exposed to the claims of creditors An exempt life insurance policy can help avoid all of these problems, leading to a larger legacy. (0.75 CE Credit) Register

May 5th, 2022 10:00 AM – 10:30 AM EST	**Drop in session** Presenter: Lidia Pirrie, Regional Sales Director & Nicholas Pateras, Insurance Sales Representative Lidia and Nicholas will show you: • How to run the Investment Strategy on our software • Where you can find resources, and • Address any questions you have • Discuss cases you'd like to share (No CE Credit) Register
May 19th, 2022 10:00 AM – 11:00 AM EST	**Beyond Illustrations** Presenter: Mark Davis, MFin, CFA, Director of Professional Insights Many assumptions insurers use may make values look better on the illustration. But, reality could be very different. Learn to look beyond the illustration to help clients make more informed decisions. (1CE Credit) Register
June 2nd, 2022 10:00 AM – 11:00 AM EST	**IFA Strategy** Presenter: Mark Davis, MFin, CFA, Director of Professional Insights Immediate Financing Arrangements (IFAs) offer an attractive opportunity for the right client. However, they're not for everyone. They add complexity and risks. This one hour overview explains the common pitfalls that should be well understood before recommending an IFA to a client. (No CE Credit) Register
June 23rd, 2022 10:00 AM – 10:30 AM EST	**Drop in session** Presenter: Lidia Pirrie, Regional Sales Director & Nicholas Pateras, Insurance Sales Representative We will show you: • IFA resources, and • sample case report for your client (No CE Credit) Register

For questions, please contact Lidia.Pirrie@sunlife.com or 416-708-4934
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YOU GROW.