

STRATEGIC

partner program



Sun 
Life Financial

Benefit additions for 2013

Program improvements



- **Dedicated toll-free support line enhancements**
 - **Superior customer service** – Interactions are managed by a large team of experienced customer care specialists
 - **Identification and prioritization** – Calls are identified and flagged for priority handling
 - **Directory service** – Quick access to dedicated contacts for escalations with the new directory option
- **Delivery receipts** – If a delivery receipt is the only delivery requirement on a new business policy, we settle the policy and advance the commission when the policy document is mailed
- **Trustworthy Selling[®]** – A comprehensive sales effectiveness program designed to help grow their business



The 'credit' system

Earning membership in the program



Strategic credits

1.5 Credits (Earned per \$ of FYC sold)	1 Credit (Earned per \$ of FYC sold)
<ul style="list-style-type: none">■ Sun Long Term Care Insurance■ Sun Critical Illness Insurance■ Personal Health Insurance■ Health Coverage Choice	<ul style="list-style-type: none">■ SunTerm■ Sun Par Protector■ Sun Par Accumulator■ Sun Lifetime Alternative

+

Regular credits

1 Credit
(Earned per \$ of FYC sold)

- Sun Universal Life
- Sun Limited Pay Life

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Total credits

Benefits and qualification criteria

Partner members

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40,000 Total Credits

0 Strategic Credits



Benefits

- Priority application processing
- Access to Directors of Advanced Planning
- Dedicated service team
- Web access for tele-interviewing
- Waived inspection reports
- Order your own APS
- Fax new business applications

Benefits and qualification criteria

Select members

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50,000 Total Credits

15,000 Strategic Credits



Benefits

- All Partner benefits
- Practice Development Summit
- Marketing Associate support program
- APS incentive benefit (with guidelines)
- Business development allowance (\$500)
- Covenant Group reimbursement (\$1,000)
- Express Yourself
- Executive Underwriting Account

Benefits and qualification criteria

Premier members

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60,000 Total Credits

30,000 Strategic Credits

- All Select benefits
- APS incentive (more cases qualify)
- Business development allowance (\$3,500*)
- Covenant Group reimbursement (\$1,500*)

Benefits

* Amount includes the Select level amount for the same benefit

Additional rewards

Hall of Famers and Consistent Qualifiers



Hall of Fame members

- Automatically receive **SELECT** membership
- Need half the requirements to reach **PREMIER**

Consistent qualifying members

- \$1,500 business development allowance
- 3 consecutive calendar years of membership at Select or Premier level

Important dates

Practice Development Summits

Dates and locations in 2013



Eastern region

May 27 - 29

Hotel Quintessence, Mont-Tremblant, QC

Central region – MGAs

May 29 - 31

Hotel Quintessence, Mont-Tremblant, QC

Western region

June 3 - 5

Four Seasons Resort Whistler, Whistler, BC

Central region – National Accounts

June 12 - 14

Hotel Quintessence, Mont-Tremblant, QC

Marketing Associate Forums

Dates and locations in 2013



Eastern region

June 5 - 6	Château Frontenac, Quebec City, QC
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Central region

June 10 - 11	Château Frontenac, Quebec City, QC
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Western region

June 20 - 21	The Westin Resort and Spa, Whistler, BC
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Thank you

Wishing you all the best in 2013

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