

HIGH NET WORTH SOLUTIONS CENTRE

Reach your highest
potential with
affluent Clients.

As an advisor with ultra-high-net-worth Clients, it should be easy for you to get the answers you need to deliver top-tier advice. To help, we created the High Net Worth Solutions Centre – an exclusive service for advisors like you.

The High Net Worth Solutions Centre (HNWSC) is a support network of Sun Life experts available to assist you as you work on cases with over \$250K of premium, or a minimum death benefit of \$7.5M.

Whether you're preparing for your first meeting with a Client or you've been working on a case for years, the HNWSC is an additional resource to get the answers you need, fast.

We help. You grow.

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EXPERT SUPPORT

- The HNWSC can provide pre-consultation or act as a sounding board to help develop optimal solutions through expert technical advice.
- It offers medical and financial underwriting advice to help submit applications efficiently.
- We rally experts from our Product, Tax, Underwriting, Distribution and Affluent Insurance Solutions teams to get you timely responses.
- The HNWSC is an additional resource to your existing team of Regional Sales Directors (RSDs) and Directors of Advanced Planning (DAPs).



UNIQUE SOLUTIONS

- No one-size-fits-all responses here. Ultra-high-net-worth Clients have complex needs that are unique. We'll collaborate with you to find the right solutions to fit those needs.
- The HNWSC can also give you information on how our solutions compare to those of our competitors.



SUPERIOR SERVICE

- Don't spend time trying to find the right contacts for your questions. We'll do the legwork and find the most appropriate experts for you.
- We'll respond to your inquiries quickly - usually within 24 hours.

Our goal is to help you, so you can continue helping Clients achieve their financial goals.

For more information on how this resource can help you, reach out to your Sun Life RSD or the HNWSC directly at HNWSolutionCentre@sunlife.com for English inquiries, or CentreSolutionCF@sunlife.com for French inquiries.