

by Editor

WELLESLEY, Mass.--(BUSINESS WIRE)--The U.S. division of Sun Life Financial Inc. (NYSE:SLF, TSX:SLF) today introduced Retirement Blueprint,SM a unique value added program designed to help advisors build their business by enhancing their income planning skills, and engaging clients in the retirement income conversation and planning process.

“Financial advisors have helped clients accumulate significant assets. But with a shift to spending underway, the rewards can be immense for advisors who are prepared to become the “one advisor” clients turn to for their retirement income strategy,” said Mike Shunney, President of Sun Life Financial Distributors, Inc., the company’s annuity distribution organization.

Because 96% of clients plan to consolidate all assets with one advisor,1 the Retirement Blueprint program is well positioned to help advisors build their business while helping their clients achieve their dream retirement. The program provides the step-by-step process and tools needed to engage clients in a discussion about lifetime income and successfully address client needs, wants, and dreams as they prepare for retirement.

Core to the program is an advisor kit containing materials to survey the opportunity, custom design income plans, and cultivate their client relationships. In addition, the program will offer a series of one-hour plug-and-play wholesaler-led training presentations on topics relevant to retirement income planning such as maximizing social security benefits, the IRA rollover opportunity, planning for healthcare expenses, and demystifying variable annuity living benefits.

“Today’s clients will face a much different retirement than previous generations, which makes it vital for advisors to understand how risk factors such as longevity and lifestyle will impact retirement income plans,” said Shunney. “Instead of focusing on specific products, the Retirement Blueprint program enables advisors to see the big picture and the many elements that could affect a person’s retirement plans and financial decisions. Mastering this paradigm shift will also prepare advisors for clients who want to begin consolidating their assets as they shift toward retirement.”

Contact a Sun Life Financial representative for more information on the Retirement Blueprint program and the sales, marketing and product support it offers at 1-866-637-5348, Option 2.

About Sun Life Financial

Sun Life Financial is a leading international financial services organization providing a diverse range of protection and wealth accumulation products and services to individuals and corporate customers. Chartered in 1865, Sun Life Financial and its partners today have operations in key markets worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China and Bermuda. As of March 31, 2008, the Sun Life Financial group of companies had total assets under management of US \$404.7 billion. Sun Life Financial Inc. trades on the Toronto (TSX), New York (NYSE) and Philippine (PSE) stock exchanges under ticker symbol SLF. Visit Sun Life Financial’s website at www.sunlife-usa.com.

Source: Sun Life Financial Inc.

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