One-on-One Sessions with a Sun Life Retirement Consultant

Sun Life Financial is pleased to offer complimentary, in-person meetings with Retirement Consultants, to University of Saskatchewan members within 5 years of retirement. Their team of experienced Retirement Consultants are licensed and familiar with pension legislation across Canada.

The following information may be covered:

Needs analysis
Retirement Consultants conduct a needs analysis to better understand your:
- ***Income needs***
- ***Risk tolerance***
- ***Need for protection products***
- ***Other circumstances (e.g. non-resident status, outside assets, DB pension, etc.)***

Education and guidance
Retirement Consultants offer information and guidance on::
- ***Unlocking rules and minimum payments***
- ***Basic tax considerations***
- ***Illustrations on decumulation strategies and income streams***
- ***Details on other income vehicles, health, life and travel insurance available***
- ***Pre- and post-retirement investing strategies***

Setting up your income stream
- ***Assist with asset consolidation***
- ***Setting your retirement plan into action and starting income payments***

To register for a One-on-One session with a Retirement Consultant, please email Christine Hillis: christine.hillis@usask.ca

Registration is required by March 14th, 2016

For more information contact Christine Hillis, Pensions Office: christine.hillis@usask.ca