

Business Succession

PLANNING PROGRAM

From Success to Succession



The **Business Succession Planning Program** is a four-step process that can help you find and train your ideal successor before you retire.

1 Recruit and select

- Finding the right person is the most important step in the process
- Good candidates can be found through referrals, personal contacts and family members
- Also consider other sources, such as colleges and universities
- Strategic personality assessments can determine if the selected candidate is a good fit

2 Educate and train

- In-depth product knowledge is needed to maintain and grow the business
- Informative recordings and presentations are available for key insurance solutions
- **Trustworthy SellingSM** helps advisors make a connection with potential clients and improves selling skills

3 Mentor and coach

Sun Life Financial has partnered with **The Covenant Group** to offer advisors effective mentoring tools such as executive coaching, the **Business BuilderTM** program and the **Advanced Practice DevelopmentTM** program.

4 Business development

Several business development tools are offered to help your successor make the most of today's ever-changing marketplace, including:

- social media training from **ES Computer Training**
- Continuing Education credits from **Advisor.ca**
- personalized content marketing from **Brighterlife.ca**

Get Started Visit sunlife.ca/advisor or talk to your Sales Director for more information.