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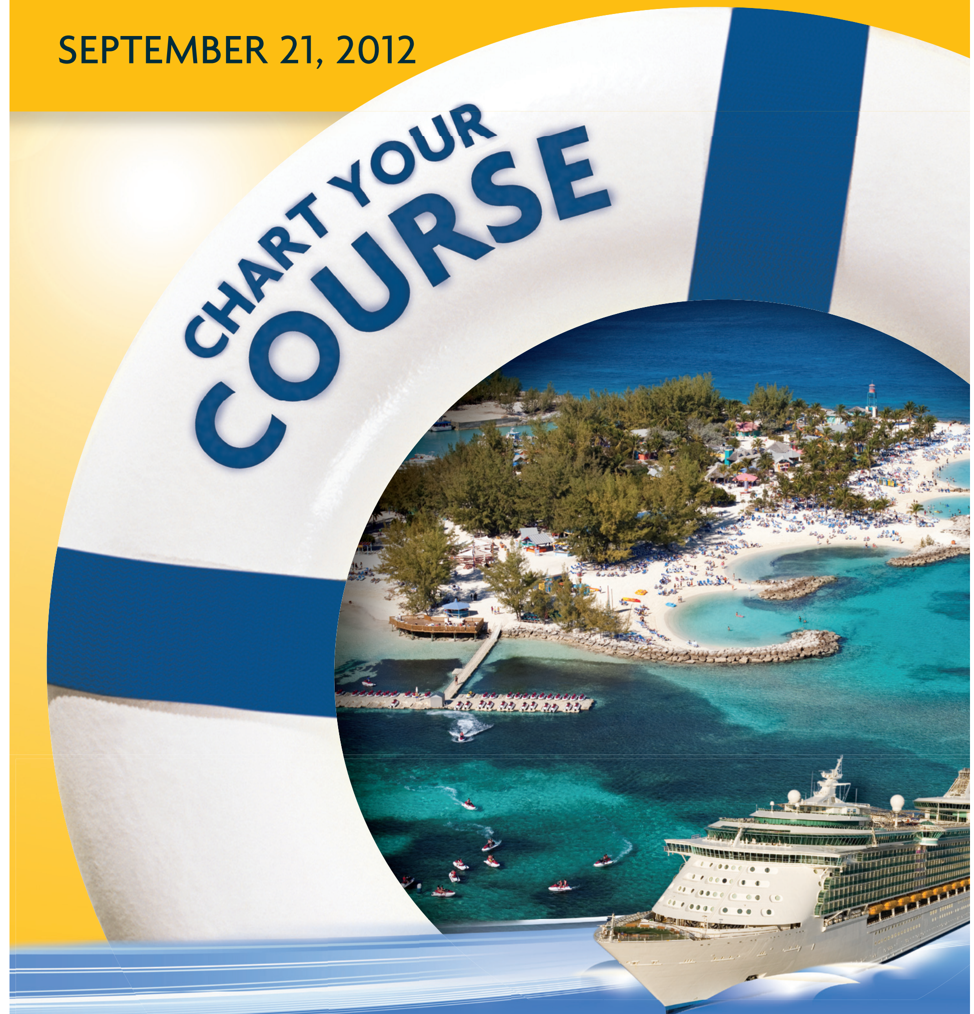
ATLANTIC SALES CONGRESS

SEPTEMBER 21, 2012



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Sun Life Financial

Welcome

Vicken Kazazian

President,
Sun Life Financial Distributors (Canada) Inc.
Sun Life Financial Investment Services (Canada) Inc.

Welcome and thank you for attending this year's Atlantic Sales Congress. Your RVP has put together a dynamic agenda which will help you grow your practices. I hope that you make the most of your time here by talking with your colleagues and visiting our trade show partners.

Best Regards,

Vic

Notes

Notes

Agenda

Friday, September 21, 2012		
Time	**Session**	**Presenter(s)**
7:00 a.m.	Registration / trade show opens	
7:00 a.m. – 8:20 a.m.	Breakfast – **sponsored by Sun Life Global Investments** Trade show	
8:30 a.m.	Main stage opens	
	Welcome / opening comments	Scott Woodman
	Chart Your Course	Vicken Kazazian
	The Critical Path™	Mark J. Halpern
	Comfort Break / trade show	
	Capital Markets Outlook	Sadiq S. Adatia
	Sales Force Council update	Kevin Williams
12:00 p.m.	Lunch – **sponsored by CI Investments** Trade show	
1:00 p.m.	Afternoon opening	Vikram Mehta
	What if you Passed the Puck?	Doug Boertien
	Finding Opportunities in Volatile Times	Stephen Groff
	Comfort break / trade show	
	CII Sales Strategies in the Business Market	Joe Moffatt
	Closing comments / Adjourn	

Guest speaker

Scott Woodman CFP, BA., B.ED, CLU

Regional Vice-President, Atlantic

Assistant Vice-President Estate & Financial Planning

Scott Woodman is the Regional Vice-President of the Atlantic Region. In this role, Scott is responsible for the Career Sales Force in Atlantic Canada, focusing on growing the sales of the region through increasing the productivity of current advisors and contracting new quality advisors to the Career Sales Force.

Scott joined Sun Life in February of 1997 as a non-occupant advisor in Happy Valley - Goose Bay, Newfoundland and Labrador. He was a successful holistic advisor before joining the MAC of Brothers, Simms and Woodman Financial Services in 1998. In February of 2000, Scott became the Financial Centre Manager in Corner Brook, NL. In May of 2006, Scott moved to St. John's, NL as the Financial Centre Manager and was successful in leading the Financial Centre team to win the Excellence Cup in 2007. He entered into his current role in March of 2008.

Scott has earned his BA and B.Ed degrees from Memorial University, NL. He completed his CFP in 2007 and his CLU in December of 2009.

Notes

ELITE PARTNER PROGRAM

ATLANTIC REGION

24	Moncton	Kevin R. Williams
24	Moncton	John Maisey
24	Moncton	Michel Butler
32	Saint John	Bruce Penny
32	Saint John	Mike Smith
41	St. John's	Gerry O'Brien
41	St. John's	Ray Monnier
56	Nova Scotia West	Terry Hines
67	Corner Brook	Randy King
67	Corner Brook	Jeff Hunter

Guest speaker

Vicken Kazazian

President,
Sun Life Financial Distributors (Canada) Inc.
Sun Life Financial Investment Services (Canada) Inc.

Vicken (Vic) is Senior Vice-President, Sun Life Financial Career Sales Force for Sun Life Assurance Company of Canada. In this role, Mr. Kazazian is responsible for managing Sun Life's career sales force, encompassing over 3600 advisors, managers, associate advisors and 400 staff across Canada. He is also the Chair of the Board of Directors for Sun Life Financial Investment Services (Canada) Inc. and President and Chair of the Board for Sun Life Financial Distributors (Canada) Inc.

Mr. Kazazian joined Sun Life Financial in 1978 and has since held various senior-level positions. Prior to assuming his current role, he was most recently Senior Vice-President, Business Development, Individual Insurance and Investments. He was responsible for the marketing, underwriting, sales and service for the business unit, as well as Sun Life's sales force and its relationship with third party distributors. Other previous roles at Sun Life include: Senior Vice-President, Business Operations and Human Resources; Vice-President Operations, Insurance and Wealth and IT Operations; and Vice- President, Business Planning and Integration.

Mr. Kazazian obtained a Bachelor of Science degree in 1976, followed by a Graduate Diploma in Management in 1978, both from McGill University.

Guest speaker

Mark J. Halpern CFP TEP

Certified Financial Planner
Registered Trust & Estate Practitioner

illnessPROTECTION.com Inc.
Insurance, Retirement & Estate Planning

Mark Halpern, CFP, TEP has been an independent insurance advisor since 1991. He's based in north Toronto.

If you live in the Greater Toronto Area, you've probably heard him on numerous radio stations with celebrity clients, educating the public about critical illness insurance and living benefits.

Mark utilizes multimedia and direct-to-consumer marketing to get his message out in a big way. His website, www.illnessPROTECTION.com, educates consumers and his radio advertising campaign introduces him to high-net-worth clients. His comprehensive tax and estate planning often leads to large life insurance sales.

Mark "crash tests" the lives of his busy and successful clients. By focusing in the largely untapped area of critical illness insurance and other living benefits, he is able to sell a lot of life insurance.

Mark is recognized as Canada's top living benefits advisor and one of the country's best-known life insurance advisors.

Mark has spoken on the main platform at the Top of the Table meetings, MDRT, The World Critical Illness Conference, CALU, Advocis and other industry conferences and corporate functions.

Mark is a member of the Toronto Estate Planning Council, Society of Trust & Estate Practitioners, Advocis, CALU, MDRT and sits on the Advisory Council for Munich Re.

Mark lives in Thornhill, Ontario, and has been married to Rhonda for the past 16 years. They keep busy with their five children, 15 years of age and under.

CHART YOUR COURSE 2012!

Elite Conference – April 2-4, 2013
Four Seasons Hotel Miami

Convention – April 4-8, 2013
Royal Caribbean International – Liberty of the Seas
Fort Lauderdale - CocoCay - Nassau - Fort Lauderdale

Guest speaker

Joe Moffatt

Regina Financial Centre

Joe Moffatt is the owner of Joe Moffatt & Associates Financial Services Inc, a thriving financial practice in Moose Jaw, Saskatchewan.

He began with Sun Life Financial over ten years ago. He and his team service the insurance and investment needs of over 1800 clients.

Joe graduated from the University of Regina with a Bachelor of Finance degree and prior to joining Sun Life Financial worked as an Investment Analyst and Fund Manager with The Saskatchewan Opportunities Corporation. Since he began his career with Sun Life Financial he has had other roles in addition to that of advisor. He was a Financial Centre Training Manager in Regina and has represented Saskatchewan and Manitoba on our Sales Force Council and Sales Force Advisory Council.

Joe's team in Moose Jaw consists of three associate advisors and three assistants. He is passionate about the insurance and investment business and the role it plays in his clients' lives. He attributes this passion to qualifying for Convention every year since joining Sun Life Financial and becoming a consistent Court of the Table member of the Million Dollar Round Table.

Joe and his wife Krista have three wonderful daughters, Caitlin, Emily and Elizabeth. A strong sense of family values and community spirit is at the heart of Joe's personality.

Guest speaker

Sadiq S. Adatia

Chief Investment Officer
Sun Life Global Investments (Canada) Inc.

Sadiq S. Adatia is chief investment officer for Sun Life Global Investments (Canada) Inc. and a key member of its executive team. In this role, Mr. Adatia is accountable for bringing clients the best in asset management and innovative solutions from around the world. He will also leverage his investment expertise to provide investment commentary to clients and media.

Mr. Adatia joined Sun Life Global Investments in July 2011, bringing with him over 15 years of experience in the investment industry. Prior to joining Sun Life Global Investments, he was chief investment officer at Russell Investments, a position he held since 2008. Mr. Adatia was responsible for all domestic and foreign investment funds sold in Canada and was also the portfolio manager for the Canadian equity, dividend and small cap products, as well as balanced portfolios.

Prior to that Mr. Adatia was the business leader for investment consulting for Central Canada at Mercer Investment Consulting.

Mr. Adatia is a member of the annual Up the Down Market event for the Down Syndrome Foundation and the Education and Examination Committee for the Society of Actuaries.

Mr. Adatia holds an Honours Bachelor of Mathematics degree in Actuarial Science & Statistics from the University of Waterloo.

He is also a CFA Charterholder, a Fellow of the Society of Actuaries (Investment Specialty Track) and a Fellow of the Canadian Institute of Actuaries.

Guest speaker

Doug Boertien

Stratford Financial Centre

Doug Boertien is the owner of DC Boertien Financial Services Inc. With his Associate Advisor/brother Mike, and his recently appointed office manager Lauren they service the needs of over 1900 clients in the surrounding rural community of North Perth, better known as Listowel - which is situated 40 minutes west of Sun Life Canada headquarters.

After finishing high school in 1980, Doug worked for the Canadian Railways until he herniated discs in his lower back in 1993. From 1994 to 1996 he attended Conestoga College for 3 years earning a Diploma in Business Administration - Accounting. The day after he graduated, he was contracted with Sun Life Financial.

Since beginning his career Doug has enjoyed building his business gradually. He worked from his home office for the first 10 years and now enjoys the visibility of a downtown office. He attributes any success he's enjoyed to treating people "the way I would expect to be treated", and prides himself in his continued task of self education - to grow as a person and to better serve his clients needs.

Doug is currently serving his second term on Agents Council, where he represents Ontario Advisors.

Doug has been married to Sandra for 28 years and they have 3 children aged 18 - 23.

Guest speaker

Stephen Groff CFA

Analyst

Stephen Groff joined Cambridge Advisors as a research analyst in May 2011. Steve's primary responsibility is on the analysis of global securities in the financials, industrials, consumer discretionary, media and telecommunications sectors, with some focus on health care.

Prior to joining Cambridge, Mr. Groff was a research analyst at Fidelity Investments, where he managed the consumer discretionary (phased in from January 2008 to April 2011) and telecommunication (mid/late 2008 to April 2011) sector sleeves of the Fidelity Canadian Disciplined Equity Fund, approximately $250 million. Steve also managed The Wilfrid Laurier Student Investment Fund in 2006 and 2007 and completed three, four month co-op work terms at Gluskin Sheff & Associates Inc.

Mr. Groff holds a B.B.A. from Wilfrid Laurier University and the CFA designation.