**Plan Advisor**

**Company name**

Address

Address

Address

Tel: Number

Fax: Number

Cell: Number

e-mail address

|  |
| --- |
|  |

Date, 2016

Recipient Name

Company Name

Address

**A cost-effective retention tool – SunAdvantage™ my savings for your employees**

Salutation

As a business owner, you know the importance of attracting and retaining good employees. A work environment and compensation package that allows you to keep your best people can be a huge competitive advantage.

That’s something I can help with. A group savings plan like Sun Life Financial’s SunAdvantage **my savings** provides your employees with an extremely valuable benefit – an easy, cost-effective way to help them save for their future. And even better, there’s no cost to you in providing it.

With **my savings**, your employees enjoy all the benefits of saving with Canada’s largest provider of group retirement services:

* A full range of investments from a variety of top fund managers, with several funds that are only available to **my savings** investors.
* Access to two combinations of savings products – you choose the one that’s right for your business:
  + **Option 1:** a Registered Retirement Savings Plan (RRSP), a Deferred Profit Sharing Plan (DPSP) and a Tax-Free Savings Account (TFSA)
  + **Option 2:** a Registered Retirement Savings Plan (RRSP) and a Tax-Free Savings Account (TFSA)
* Group buying power, with fund management fees often lower than those available to retail investors

24/7 access to their account – and personal, professional support any business day through the Sun Life Financial Customer Care Centre. In addition, Sun Life Financial handles all of the administrative and investment records and there is absolutely no cost required on your part to provide the plan.

I’ve enclosed a brochure that provides more information about how **my savings**works. Please take a moment to look it over. I’d like to give you a call over the next couple of weeks to answer any questions you may have. I would be pleased to set up a time to meet and talk about how **my savings** can provide your business with a valuable and cost-effective employee retirement savings benefit.

If you have any questions in the meantime, please feel free to call me at XXX-XXX-XXXX or e-mail [advisor.name@abccompany.com](mailto:advisor.name@abccompany.com) at your convenience. I look forward to speaking with you.

Sincerely,