

# “UNDERSTANDING WHOLE LIFE INSURANCE”

## WORKSHOP

**Facilitated by:** Tom Belanger, CIP CLU ChFC CFP  
Director, Sales Development  
Unity Life of Canada, a Foresters Company

**Duration:** 2 hours

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**Objective:** To provide attendees with an overview of how participating Whole Life Insurance is designed including learning the key features and benefits of the product and the target market.

**Who the Workshop is intended for:** Brokers who require an in-depth understanding of how basic WL’s work and how they can use WL to meet various client needs.

### **Workshop Overview:**

The first part of the Workshop will focus on the individual components of WL.

- Key features and benefits of all Whole Life insurance
- What does Guaranteed Cash Surrender Value mean?
- What are "dividends" and the choices
- How do Paid Up Additions work
- Blended Insurance -- how are these plans constructed
- Overview of key features of Foresters Advantage Whole Life series - whole life + 3 blended versions
- Case studies using software with discussion of target markets.

The second part of the Workshop will focus on the “application” of each of the components using Foresters “Advantage Series Whole Life” as the product to illustrate these applications.

This will include a discussion of how the brokers can market WL to different client segments, with some concepts they can utilize.

### **Seminar Dates**

<u>Dates*</u>	<u>Location</u>	<u>Time</u>
April 29 <sup>th</sup>	Unity Life, Mississauga	9:30am – 11:30pm

\*more dates may follow.

Limited seats available. Click [here](#) to register or RSVP to Kristin McClatchey, Marketing Coordinator via email at [kmclatchey@unitylife.ca](mailto:kmclatchey@unitylife.ca).

