

List

Sales material **Life** & **Health**

February 2011









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Money working for people

	Product	Reference number	Size		Target		Availability	
			PDF	Printed	Advisor	Client	Webi	Inventory
 <p>PACE Brochure – Your financial planning platform Contains all the relevant information on PACE.</p>	PACE	#02264E #02264S (Chinese)	•	•	•	•	•	•
 <p>Poster – Make your dreams come true To ensure visibility. Draws attention to the product and underlines its communication aspect.</p>	PACE		•	•	•	•		
 <p>Flyer – Golden Edge</p>	Golden Edge	#00234E	•	•	•	•	•	•
 <p>Folder – The Desjardins Financial Security Planned Gift To insert documents relating to the DFS Planned Gift.</p>	Planned Gift	#03047E	•	•	•	•	•	•
 <p>Brochure – A brilliant way to give! Presents the main benefits and characteristics of the DFS Planned Gift.</p>	Planned Gift	#03047E02 #03047E04	•	•	•	•	•	•
 <p>Brochure – Advantage to be highlighted Presents the main benefits and characteristics of the DFS Planned Gift.</p>	Planned Gift	#03047E05	•	•	•	•	•	•
 <p>Rate Table – A thoughtful way to give Steps to follow to complete the application, premiums tables and examples of premium calculations.</p>	Planned Gift	#03047E06	•	•	•		•	•
 <p>Life Start 15 Leaflet Presents the main features and premium rate for Life Start 15.</p>	Life Start 15	-	•		•		•	
 <p>Life Start 15 Leaflet Presents the benefits and characteristics of Life Start 15.</p>	Life Start 15	-	•		•		•	





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	Life 10 Life 20 brochure Presents the benefits and characteristics of the Life 10, Life 20 and Guaranteed Whole Life products.	#08088E Life 20 #08088S (Chinese)	•	•	•	•	•	•
	Leaflet – Life 20 Resumes the Life 20 advantages.	Life 20 -	•		•		•	
	Edit file - Life 20 Tool of assistance to the sale the folder customer Life 20 and describing the characteristics of Life 20 and the Multi-Coverage Discount (MCD).	Life 20 #04104E	•		•	•	•	•
	Brochure Life 20 – Multi-Coverage Discount Demonstrates the advantages of combining Life 20 with another product eligible for the Multi-Coverage Discount.	MCD -	•		•		•	
	Edit file – MCD MCD tool of assistance to the sale showing how the Reduction Multi cover (MCD) can make profit from a reduced rate of premiums!	MCD -	•		•	•	•	
	Flyer – Securing your financial future Overview of the Term 10, Term 20 and MAXLife products	Term 10, 20 years & MAXLife	•		•		•	
	Client Brochure Brochure that describes the Accelerated Health Care product.	Accelerated Health Care #00135E #00135S (Chinese)	•	•	•		•	•
	Brochure – Because you will survive... Prospecting tool for the health market.	Harmony #00131E03	•	•	•		•	•









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 <p>Brochure - Harmony Explains the critical illness insurance, how it works, how much it costs, underwriting process as well as claim process. Gives the characteristics of the four products included in the Harmony range of critical illness coverage.</p>	Harmony	#00133E01 #00133S01 (Chinese)	•	•			•	•
 <p>Critical Illness at a glance Provides at-a-glance information on target markets, distinctive features and products description for each of our critical illness insurance products.</p>	Harmony	#10311E	•	•	•		•	•
 <p>Guide – Serious Illness The Serious Illness Guide contains information on all the illnesses and conditions covered by our health products including a short interpretation of our policy contract definitions as well as vital statistical and general information on these illnesses.</p>	Harmony	#00131E02	•	•	•	•	•	•
 <p>Critical Illness Pre-Screening Guide Information about illnesses/conditions resulting in a decline or extra premium rating, family history, height & weight chart, blood pressure and cholesterol, possible exclusions. Determine the eligibility of a client (adult or child) for critical illness insurance protection.</p>	Harmony	#00131E04	•	•	•		•	•
 <p>Leaflet – Prompt Recovery Prompt Recovery is a free assistance service available to clients that have a critical insurance, includes Best Doctors. Can also be used as a sales support tool to present the assistance services provided with our insurance coverage's.</p>	Harmony	#00133E02	•	•	•	•	•	•
 <p>Independent Living and Harmony Flyer A useful tool in prospecting that demonstrates the advantages of Harmony and Independent Living. Can be handed out during special events (conferences).</p>	Harmony and Independent Living	#06016E01	•	•			•	•
 <p>Direct mail leaflet A useful tool in prospecting that demonstrates the advantages of Harmony New Generation, critical illness insurance for children.</p>	Harmony New Generation	#06073E	•	•			•	•
 <p>Direct mail leaflet A useful tool in prospecting that demonstrates the advantages of Harmony New Generation, critical illness insurance for children.</p>	Harmony New Generation	#06073E01	•	•			•	•








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	Prospecting Letter Prospecting tool that creates awareness about the importance of critical illness insurance for children.	-					•	•
	Consumer's CI Simplified Issue - Brochure This brochure includes an explanation of the offer, the product features, a rate table and a short application with the 7 medical questions.	#07143E	•	•			•	•
	Consumer's Critical Illness Brochure The brochure is an excellent way to introduce existing clients and new prospects to the main benefits and features associated with the most competitive CI protection in Canada.	#07143E	•	•			•	•
	Consumer's CI T10/T20 Flyer Presents the benefits and features of the Consumer's CI T10/T20 protection.	-	•				•	
	Mortgage brochure Sales track brochure that brings the client to realize the importance of insuring their mortgage. Also presents the characteristics of Mortgage Disability Protector and Mortgage Protector (U.L. and Non U.L.).	#05048E	•	•			•	•
	Mortgage Guide Demonstrates the main features of the Mortgage Protector Plan, Mortgage CI Protector and the Mortgage Disability Protection as it pertains to homebuyers as well as other properties with major loans.	-	•				•	•
	SOLO – Representative Guide A complete and comprehensive reference document on SOLO coverage , including exclusions and limitations, underwriting criteria, etc.	-	•				•	
	SOLO – Representative Brochure Brochure presenting the main features and benefits of each of the SOLO protections, based on the specific target groups. Content uses statements that can be shared with clients.	#09035E	•	•			•	•


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	SOLO Living Expenses and SOLO Accident Disability Income Brochure presenting the main features and benefits of SOLO Living Expense and SOLO Accident Disability Income, including rates, etc.	Solo #09036E	•	•	•	•	•	•
	Client brochure – SOLO Brochure presenting the main features and benefits of each of the SOLO protections, including the Healthcare protection.	Solo #1006E	•	•	•	•	•	•
	Brochure - SOLO Agriculture This brochure presents the different protection offered within SOLO Agriculture, a personalized disability income and health care protection created with today's farmer in mind to answer their specific needs.	Solo Agri-culture #09217E	•	•	•	•	•	•
	Leaflet – Solo HCP Presents advantages, features and coverages of Solo HCP.	Solo HPC #02290E	•	•	•	•	•	•
	SOLO Healthcare Brochure Provides an overview of SOLO Healthcare coverage. Explains pricing and eligibility requirements. Includes detailed reimbursement schedules by coverage type.	Solo Health #10292E	•	•	•	•	•	•
	SOLO Healthcare - Rate calculator and Worksheet Keep a calculator brochure handy to help make a quick quote. While an illustration is still required to be submitted with an application, the calculator can help you show a client the protection costs, when your computer is not handy.	Solo Health Different item # depending of the Province	•	•	•	•	•	•
	SOLO Healthcare - Direct-mail brochure Prospecting tool for the healthcare market.	Solo Health #10254E	•	•	•	•	•	•

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 <p>Pamphlet – Client pamphlet Presents an overview of the Enhanced T10 offer.</p>	Enhanced T10	#03104E	•	•			•	•
 <p>Direct mail postcard – Mortgage Market A useful tool for prospecting and to inform existing clients of the need for mortgage insurance for both life and health risks.</p>	Enhanced T10	#03070E03	•	•			•	•
 <p>Pamphlet – Independent Living, Total long-term care Presents the benefits and the characteristics of Independent Living.</p>	Independent Living	#05041E01 #05041S01 (Chinese)	•	•			•	•
 <p>Leaflet – Don't let your "retirement" dreams pass by... A useful tool in prospecting for new clients and to inform existing clients of the realities and need for long-term care.</p>	Independent Living	#05041E02	•	•			•	•
 <p>Leaflet – Tender Loving Care for your parent's physical and financial well-being A useful tool in prospecting for new clients. Highlights the parent-children relation.</p>	Independent Living	#05041E04	•	•			•	•
 <p>Pre-screening Guide Unique in the industry! This guide will permit you to pre-qualify your client. Use of this guide will enhance the potential acceptance of your client and speed up the underwriting and issue process.</p>	Independent Living	-	•				•	
 <p>Sales support brochure This tool presents every step of the sales process for a long-term care protection. This brochure brings the client to realize the importance of a long-term care protection. To use as a sales track and therefore introduce the product to your clients. For representatives use only.</p>	Independent Living	#05041E #05041S (Chinese)	•	•			•	•
 <p>Brochure – Assistance services, Independent Living Total Long-term Care Describes the free services available to clients who purchased an Independent Living contract. Can also be used as a sales support tool to present the assistance services provided with our insurance coverages.</p>	Independent Living	#05041E03	•	•			•	•

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 <p>Routine Daily Activities Pre-approach Letter A useful prospecting tool that can be personalized with Profile Clients. It creates awareness about long-term care issues and it is a call-to-action to deal with concerns. Target market: all.</p>	Independent Living	Direct Mail Letter 1 - Routine Daily Activities.	•			•	•	
 <p>Retirement Pre-approach Letter A useful prospecting tool that can be personalized with Profile Clients. To accompany the direct mail leaflet. It creates awareness about long-term care issues and it is a call-to-action to deal with concerns. Target market: retirees and individuals who are planning their retirement.</p>	Independent Living	Direct Mail Letter 2 - Retirement	•			•	•	
 <p>Children Pre-approach Letter A useful prospecting tool that can be personalized with Profile Clients. It creates awareness about long-term care issues and it is a call-to-action to deal with concerns. Target market: adult children of elderly parents.</p>	Independent Living	Direct Mail Letter 3 - Children	•			•	•	
 <p>Remain at Home Pre-approach Letter A useful prospecting tool that can be personalized with Profile Clients. It creates awareness about long-term care issues and it is a call-to-action to deal with concerns. Target market: all.</p>	Independent Living	Direct Mail Letter 4 - Remain At Home	•			•	•	
 <p>Independent Living and Harmony Flyer A useful tool in prospecting that demonstrates the advantages of Independent Living and Harmony. Can be handed out during special events (conferences).</p>	Independent Living and Harmony	#06016E01	•	•		•	•	•
 <p>Preparation guide – "Long-Term Care Underwriting Interview Guidelines" Presents the Long-Term Care Underwriting Interview Guidelines.</p>	Independent Living	#06231E	•	•		•	•	•
 <p>Independent Living 20 promotional leaflet Compares the product features of Independent Living and Independent Living 20. For advisors only.</p>	Independent Living	-	•			•		

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	FNA brochure Provides the cost for home care, private care facilities and government subsidized facilities to help your clients make an informed decision regarding their long-term health care needs. Real life examples are illustrated for each type of care.	Independent Living #05041E05	•	•			•	•
	For your Family – The Benefit Sharing Plan Explains the characteristics and main benefits of the Benefit Sharing Plan	Benefit Sharing Plan Concept (BSP) Family #04116E01 Key employee #04116E02 Shareholder #04116E03	•	•			•	•
	For your Family – The Benefit Sharing Plan Explains the characteristics and main benefits of the Benefit Sharing Plan	Benefit Sharing Plan Concept (BSP) Family #04116E01 Key employee #04116E02 Shareholder #04116E03	•	•			•	•
	Advisor's Guide Summary of the BSP target markets, taxation and legal issues.	Benefit Sharing Plan Concept (BSP) -	•		•		•	
	Prospecting letters	Benefit Sharing Plan Concept (BSP) Family Key employee Shareholder	•				•	•
	Brochure – Wealth Escalator Plan Explains the characteristics and main benefits of the WEP.	Wealth Escalator Plan Concept (WEP) Individual #05098E Company #05098E01	•	•			•	•
	Prospecting letters	Wealth Escalator Plan Concept (WEP) Individual Company	•				•	•
	Advisor's Guide Complete advisor guide that explains how Collateral Financing works.	Collateral Financing Concept -	•		•		•	

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<p>---</p> <p>M.R.S. Kit</p> <p>Kit including all of the required forms by M.R.S. Trust Company for the assignment of a life insurance policy as collateral.</p>	Collateral Financing Concept	#0608E	•			•		•
 <p>Letter of Intent</p> <p>Letter given to clients when they purchase a life insurance policy that informs of the possibility of obtaining a loan by M.R.S. Trust Company for Collateral Financing.</p>	Collateral Financing Concept	-	•			•		•
 <p>Agreement Parameters</p> <p>Sheet containing all of the parameter details of the agreement for Collateral Financing with M.R.S. Trust.</p>	Collateral Financing Concept	-	•			•		•
 <p>Procedures and Coordinates</p> <p>List of all the procedures that need to be done for Collateral financing with M.R.S. Trust.</p>	Collateral Financing Concept	-	•			•		•
 <p>Policyowner's statement</p> <p>Form that must be signed by the client for the assignment of a life insurance policy as collateral for a loan.</p>	Collateral Financing Concept	-	•			•		•
 <p>EHSP Solution Brochure – Executive health Savings Plan, a Health Solution for your business</p> <p>Tips for each step of the sales process</p>	EHSP Concept	#03088E	•	•		•		•
 <p>EHSP Centres of Influence Brochure</p> <p>Introduces the concept to accountants, lawyers or tax specialists that you wish to build business partnerships with and in turn, protect the mutual interests of each others clients.</p> <p>For accountants, lawyers, tax specialists</p>	EHSP Concept	#03088E01	•	•		•		•
 <p>Strength Security Commitment</p> <p>The ideal product summary marketing brochure describing the tools available to support all of our financial advisors.</p>	DFS	#02132E01	•	•	•			•

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 <p>Overview of Products and Sevices</p> <p>The brochure describes the products and services offered to individuals, groups and businesses.</p>	DFS	#10015E	•	•	•		•	•