

# Sun Life Financial 2011 Life Sales Leaders Conference

Ritz Carlton • St. Thomas, Virgin Islands • March 3–7, 2011

## QUALIFICATION PERIOD

The qualification period for the Sun Life Financial Life Sales Leaders Conference is for universal life insurance applications issued and in-force between January 1, 2010 and December 31, 2010.



## PRODUCTION REQUIREMENTS

### General Agents:

- Place in the Top 35 for Brokerage General Agents
- Minimum of \$500,000 in conference credit to qualify

## ELIGIBLE PRODUCTS

- All current Universal Single Life and Survivorship at 100% first year target premium\*
- Sun Executive at 33% of first year target premium
- Sun Executive multi-life policy cases will qualify as one new policy
- No Variable Products are eligible
- Conference credits for new qualifying products introduced in 2010 will be announced at launch

\*Products issued by Sun Life Insurance and Annuity Company of New York are not eligible for the 2011 Life Sales Leaders Conference.

## PRODUCER QUALIFICATION

- Place in the Top 25 for Producers
- Minimum of \$200,000 in conference credit
- 5 new issued and in-force policies during qualification period

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## INVITATION

Only the qualifier and his/her spouse or guest 18 years or older may attend the conference. All guests must be accompanied by the qualifier. Participation is voluntary and by invitation only. Invitations are not transferable by the qualifier to any third parties. In the event that multiple qualifiers have equal conference credits to qualify for the last spot as the Top 35 General Agent or Top 25 Producer, each will be invited to participate. Qualifiers that are unable to attend the conference are not entitled to any other compensation.

## EXPENSES

Qualification for this conference includes an invitation for you and your spouse or a guest. The cost of attendance is treated as taxable income. All qualifiers will be responsible for all federal/state income taxes as a result of attending this conference. A 1099 will be issued to each attending qualifier based on the fair market value of the conference trip. These expenses include round-trip airfare, hotel, meals, recreation, entertainment and ground transportation. All qualifiers should consult with their tax advisors regarding the tax implications of attending the conference.

### Sun Life Financial will provide the following:

- Air transportation (coach class) from the nearest airport to the conference destination
- Hotel accommodations
- Company sponsored functions
- Ground transportation from destination airport to hotel

### Sun Life will not provide the following:

- Transportation to and from residence or business to airport
- Additional cost/fees associated with changed airline tickets after the initial ticketing

Any deviation from the Sun Life Financial planned conference is at the qualifier's own expense. All additional travel expenses must be paid in full by the participant prior to the conference.

Sun Life Financial reserves the right to amend the rules governing the qualification requirements of the 2011 Life Sales Leaders Conference during the qualification period. All inquiries concerning the conference can be submitted to [richard.granger@sunlife.com](mailto:richard.granger@sunlife.com).

*Universal life insurance products are issued by Sun Life Assurance Company of Canada (Wellesley Hills, MA). All guarantees are based on the claims-paying ability of the issuing company. Sun Life Assurance Company of Canada (Wellesley Hills, MA) is a member of the Sun Life Financial group of companies.*

**NOT FDIC/NCUA INSURED • MAY LOSE VALUE • NO BANK/CREDIT UNION GUARANTEE • NOT A DEPOSIT • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY**

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