# Wealth Transfer Guide

## Marketing Documents

## Description

This document presents essential marketing tools to support your wealth transfer initiatives. It includes documents designed to facilitate your communications, showcase your expertise and effectively support your clients.

### Retirement Strategy

- F13-668A | Retirement Income Planning – Client Guide
- Retirement Journey Support Guide
- SRM111A-8 | Retirement Products – Guide

### Segregated Fund Approach

- F13-1010A | Series 75/100 – Growth and estate protection combined
- F13-1010A-1 | Series 75/100 – Client leave behind
- FAQ | Successor Annuitant Designation
- SRM503A-29 | Successor annuitant sales concept
- Segregated Funds 101

### Prestige Preferential Pricing

- F13-994A | Prestige 300 and 500 – Advisor brochure
- F13-992A | Prestige 300 and 500 – Client brochure

### Estate Planning

- F13-1043A | Estate planning: Do you know your parents' wishes?
- F13-1091A | Sales concept: Intergenerational Wealth Transfer
- F13-925A | Inheritance Your Way – Promotional brochure
- Inheritance Your Way | FAQ

### Insurance Approach

- F13-1154A | Balance sheet strengthening with iA PAR Wealth
- F13-1119A | Estate Bond for Individuals
- F13-1120A | Estate Bonds – Corporations
- Fund brochure – Smoothed Return Diversified Account
- F13-1094A | Retirement Insurance Strategy Concept
- F13-665A | Planned Donation – Client brochure
- F13-665A-4 | Planned Donation Guide

### Tax Planning

- Transfer of ownership of a life insurance policy involving a corporation
- Capital dividend account
- Shareholder Agreement: Life Insurance, a Valuable Tool in the Event of Death
- Tax implications upon death
- Estate freeze



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