

## Marketing materials in Chinese

Below is a listing of the materials that are available in Chinese. Please use the form number to order the items listed from [supply](#).

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## Business development

<b>Freedom 55 Financial and Quadrus business cards</b>	<a href="#">15-0011CH</a> (outside Quebec only) <a href="#">46-7105 CH</a> (Quebec only)
<b>Security checklist</b>	<a href="#">47-1332 CH</a> (outside Quebec only)
<b>Reach your potential with Canada Life</b> Client brochure about how we aim to empower Canadians to make the most of their potential by supporting our clients and communities.	<a href="#">70-0406 CH</a> (traditional Chinese) <a href="#">70-0406 CHS</a> (simplified Chinese)
<b>Helping you reach your goals at every stage of life</b>	<a href="#">46-6521 CH</a> (traditional Chinese)
<b>The way we work</b>	<a href="#">46-6690 CH</a> (traditional Chinese)
<b>Planning services for you</b> <b>Coming soon</b> Introduces prospective clients to the benefits of creating a solid financial plan with you.	<a href="#">46-10921 CH</a> (traditional Chinese) <a href="#">46-10921 CHS</a> (simplified Chinese)
<b>Chinese calendars</b> Please note, information you place in the advertising area of the calendar must be submitted to <a href="#">Field Marketing</a> for necessary approvals. Contact: Eddie Lai, Intak Printing 1361 Huntingwood Drive, Unit 9, Toronto, ON M1S 3J1 Ph: 416-298-7735 Fax: 416-298-7260 <a href="mailto:eddie@intakprinting.com">eddie@intakprinting.com</a> <a href="http://www.intakprinting.com">www.intakprinting.com</a>	
<b>Chinese template website option</b> Create a website for your business using <a href="#">pre-approved template content</a> <i>Business development &gt; Growing your business &gt; Advertising &amp; marketing &gt; Website, social media and online advertising &gt; Chinese template website option</i>	
Careers website	<a href="#">Traditional Chinese</a> <a href="#">Simplified Chinese</a>

## Life insurance

<b>Participating life insurance: The basics</b> Introduce your clients to participating life insurance by taking a look at how it works, its benefits and why the participating account matters.	<a href="#">46-11143 CH</a> (traditional Chinese) <a href="#">46-11143 CHS</a> (simplified Chinese)
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<p><b>Participating life insurance financial facts</b> This guide helps your clients understand how participating life insurance works. It also provides important financial facts, and the risks and advantages of a participating policy.</p>	<p><a href="#">46-4758 CH</a> (traditional Chinese) <a href="#">46-4758 CHS</a> (simplified Chinese)</p>
<p><b>Estate planning guide</b> Provide clients an overview of estate planning, important considerations and discuss the six key steps to develop an estate plan.</p>	<p><a href="#">46-10121 CH</a> (traditional Chinese)</p>
<p><b>How participating life insurance works for you</b> This client guide outlines the features and benefits of participating life insurance in an easy-to-understand format.</p>	<p><a href="#">70-0088 CH</a> (traditional Chinese) <a href="#">70-0088 CHS</a> (simplified Chinese)</p>
<p><b>Stability for uncertain times</b> Use this brochure to help clients understand how our participating life insurance products provide stable growth in uncertain times. Topics include guarantees, downside risk protection, asset mix, smoothed returns, our strong commitment to par.</p>	<p><a href="#">46-10825 CH</a> (traditional Chinese) <a href="#">46-10825 CHS</a> (simplified Chinese)</p>
<p><b>Stay close to your wealth</b> Find out how Canada Life Wealth Select may give your clients the flexibility, protection and options they're looking for.</p>	<p><a href="#">70-0267 CH</a> (traditional Chinese) <a href="#">70-0267 CHS</a> (simplified Chinese)</p>
<p><b>Application for insurance - medical history questionnaire</b> Extracted from the online application for insurance, this medical history questionnaire helps clients understand the medical terms when completing the life insurance application.</p>	<p><a href="#">99-6376 CH</a> (traditional Chinese) (electronic only)</p>
<p><b>Put some life (insurance) into your financial portfolio</b>  Show your clients how they can avoid the "passive income trap" with a corporate-owned permanent life insurance policy.</p>	<p><a href="#">46-11117 CH</a> (traditional Chinese) <a href="#">46-11117 CHS</a> (simplified Chinese)</p>
<p><b>PAR historical performance inserts</b>  Since this is the first edition of Financial facts since we combined the Great-West Life, London Life and Canada Life open participating accounts on Jan. 1, 2020, we won't have historical data until next year.  However, we do have historical data for the Great-West Life, London Life and Canada Life open accounts before amalgamation. That's why we've created special separate historical performance pieces you can share with clients when you show them Financial facts.</p>	<p><a href="#">46-11486 CH GWL</a> (traditional Chinese) <a href="#">46-11486 CHS GWL</a> (simplified Chinese)</p> <p><a href="#">46-11487 CH LL</a> (traditional Chinese) <a href="#">46-11487 CHS LL</a> (simplified Chinese)</p> <p><a href="#">46-11488 CH CL</a> (traditional Chinese) <a href="#">46-11488 CHS CL</a> (simplified Chinese)</p>

## Life insurance support material for policies issued before Jan. 1, 2020

<p><b>Sample contract for participating life insurance policies issued in 2017 or later (G3)</b> A Wealth Generator, 20-pay, single-life sample contract. Use it to prepare yourself for contract delivery and familiarize yourself with contract variables for participating life insurance.</p>	<p><a href="#">Sample contract</a></p>
<p><b>Sample contract for participating life insurance policies issued before end of 2016 (G2)</b> A 20-Pay Life, single-life sample contract. Use it to prepare yourself for contract delivery and familiarize yourself with contract variables for participating life insurance.</p>	<p><a href="#">Sample contract Scenario in English</a></p>

## Living benefits

<p><b>A look at living benefits claims client brochure</b> Helps establish the need for critical illness insurance with a focus on critical insurance claims, including common causes of claims and examples of claims paid.</p>	<p><a href="#">70-0059 CH</a> (chinois traditionnel) <a href="#">70-0059 CHS</a> (chinois simplifié)</p>
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<p><b>Coverage when it counts</b> This brochure provides an introduction to critical illness insurance by helping clients understand how it works and why they need it.</p>	<p><a href="#">70-0050 CH</a> (traditional Chinese)</p>
<p><b>Definitions LifeAdvance and Child LifeAdvance</b> This brochure provides critical illness definitions for both Adult and Child LifeAdvance insurance products.</p>	<p><a href="#">46-10666 CH</a> (traditional Chinese) <a href="#">46-10666 CHS</a> (simplified Chinese)</p>
<p><b>Child LifeAdvance™ client brochure</b> This brochure gives an overview of the stand-alone critical illness product for children.</p>	<p><a href="#">172 CH</a> (traditional Chinese)</p>

## Investments

<p><b>Mutual fund client brochure</b> Share this brochure with clients to provide an easy-to-understand introduction to Canada Life mutual funds.</p>	<p><a href="#">70-0425 CH</a> (traditional Chinese) <a href="#">70-0425 CHS</a> (simplified Chinese)</p>
<p><b>Segregated funds or mutual funds which investment option is best suited for you?</b> Use this client-friendly brochure to provide an in-depth look at the differences between segregated and mutual funds.</p>	<p><a href="#">46-10551 CH</a> (traditional Chinese) <a href="#">46-10551 CHS</a> (simplified Chinese)</p>
<p><b>Segregated funds: protect your savings as you grow your wealth</b> Share this brochure with your clients to help illustrate the features and benefits of segregated funds. It also includes a spot for you to add supporting materials.</p>	<p><a href="#">46-10545 CH</a> (traditional Chinese) <a href="#">46-10545 CHS</a> (simplified Chinese)</p>
<p><b>Pathways client brochure</b> Share this brochure with clients to provide an easy-to-understand introduction to Pathways funds.</p>	<p><a href="#">70-0207 CH<sup>[OBJ]</sup></a> (traditional Chinese) <a href="#">70-0207 CHS</a> (simplified Chinese)</p>
<p><b>Pathways fund feature sheets</b> These fund feature sheets provide an overview of the Pathways Funds and fund managers.</p>	<p><a href="#">(traditional and simplified Chinese)</a></p>
<p><b>RESP client brochure</b> A brochure to use with clients to help them learn more about RESPs and investing in a child's education</p>	<p><a href="#">70-0536 CH</a> (traditional Chinese) <a href="#">70-0536 CHS</a> (simplified Chinese)</p>
<p><b>Understanding your segregated fund series solutions</b> <b>Coming soon</b> A quick reference to help you find the most suitable fund series for your clients' needs.</p>	<p>46-11122 CH (traditional Chinese) 46-11122 CHS (simplified Chinese)</p>
<p><b>A deeper dive into the Canada Life Segregated funds</b> <b>Coming soon</b> These fund feature sheets provide a deeper dive into the top-performing funds and the fund managers.</p>	
<p><b>A deeper dive into the Canada Life Pathways funds</b> <b>Coming soon</b> These fund feature sheets provide a deeper dive into the top performing funds and fund managers.</p>	
<p><b>Secure your legacy</b> A brochure for 80- 90-year-old clients, explaining what Estate Protection is and outlining the need for protecting one's legacy.</p>	<p><a href="#">46-10517 CH</a> (traditional Chinese) <a href="#">46-10517 CHS</a> (simplified Chinese)</p>
<p><b>Secure your parents' legacy</b> <b>Coming soon</b> A guide to help clients start the Estate Protection conversation with their parents.</p>	<p>99-6015 CH (traditional Chinese) (electronic only)</p>
<p><b>Income annuities – retirement income guaranteed</b> Share this brochure with clients to give them an in-depth look at income annuities.</p>	<p><a href="#">46-9479 CH</a> (traditional Chinese) <a href="#">46-9479 CHS<sup>[OBJ]</sup></a> (simplified Chinese)</p>
<p><b>Investor profile questionnaire</b> This questionnaire can help you determine the appropriate asset mix for your clients by supporting conversations around their financial goals, current financial situation, investment experience and attitude toward risk.</p>	<p><a href="#">46-5562B CH</a> (traditional Chinese) <a href="#">46-5562B CHS<sup>[OBJ]</sup></a> (simplified Chinese)</p>

## Investments – Risk-Managed Portfolios

<p><b>Risk-managed portfolios client brochure</b> This brochure gives clients an easy-to-understand overview of Risk-Managed Portfolios.</p>	<p><a href="#">70-0555 CH</a> (traditional Chinese) <a href="#">70-0555 CHS</a> (simplified Chinese)</p>
<p><b>Risk-managed portfolios advisor brochure</b> This advisor brochure provides more information on the key benefits and features of Risk-Managed Portfolios.</p>	<p><a href="#">70-0558 CH</a> (traditional Chinese) <a href="#">70-0558 CHS</a> (simplified Chinese)</p>

## Investments – Constellation

<p><b>Constellation client brochure</b> (available from supply Nov. 16) Use this brochure to show your clients how investing with Constellation can help them reach their goals.</p>	<p><a href="#">46-11276 CH</a> (traditional Chinese) <a href="#">46-11276 CHS</a> (simplified Chinese)</p>
<p><b>Client video</b> These pieces highlight the technology behind the scenes that works for investors through market fluctuations while considering their risk profile.</p>	<p><a href="#">Traditional Chinese</a> <a href="#">Simplified Chinese</a></p>
<p><b>Advisor brochure</b> This brochure shows how Constellation can help you find business efficiencies and streamline your investment responsibilities so you can focus on what matters most – your client relationships and building your business.</p>	<p><a href="#">46-11188 CH</a> (traditional Chinese) <a href="#">46-11188 CHS</a> (simplified Chinese)</p>
<p><b>Case studies</b> Prepare for client meetings by reviewing these two case studies.</p>	<p><a href="#">99-10534 A CH</a> (traditional Chinese: Andy/Amy) <a href="#">99-10534 B CH</a> (traditional Chinese: Robert) <a href="#">99-10534 A CHS</a> (simplified Chinese: Andy/Amy) <a href="#">99-10534 B CHS</a> Simplified Chinese case study (Robert)</p>
<p><b>Productivity gains brochure</b> This brochure shows you how Constellation’s automation and digital tool can help you find more efficiencies in your business so you can spend more time with your clients.</p>	<p><a href="#">46-11476 CH</a> (traditional Chinese) <a href="#">46-11476 CHS</a> (simplified Chinese)</p>
<p><b>Constellation: Advisor to client email template</b> Personalize these emails to introduce goals-based investing to both new and existing clients.</p>	<p>New clients <a href="#">(traditional Chinese)</a> <a href="#">(simplified Chinese)</a> Existing clients <a href="#">(traditional Chinese)</a> <a href="#">(simplified Chinese)</a></p>

## Investments – Sustainable Portfolios

<p><b>Advisor guide</b> This advisor guide provides more information on the key benefits and features of Canada Life Sustainable Portfolios.</p>	<p><a href="#">99-52853 CHS</a> (simplified Chinese) <a href="#">99-52853 CH</a></p>
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	(traditional Chinese)
<b>Client brochure</b> This brochure gives clients an easy-to-understand overview of Canada Life Sustainable Portfolios.	<a href="#">99-52854 CHS</a> (simplified Chinese) <a href="#">99-52854 CH</a> (traditional Chinese)

## Mortgages

<b>Protect what matters most, not just your house</b> This brochure shows clients why individual insurance may be a better option than mortgage insurance: it protects more than just their home; it protects what's important in their life.	<a href="#">46-10165 CH</a> (traditional Chinese)
<b>Find your personalized mortgage solution</b> The Chinese version is ideally positioned to use with clients who are first-time home buyers and can be used as an icebreaker when discussing long-term financial goals.	<a href="#">46-10010 CH</a> (traditional Chinese) <a href="#">46-10010 CHS</a> (simplified Chinese)
<b>Protect your family instead of your lender</b> Use this brochure with new and existing clients to highlight the benefits of individual insurance as compared to mortgage insurance.	Available from supply <a href="#">46-10167 CH</a> (traditional Chinese)

## Compliance

<b>Privacy commitment and client file consent form</b> When you start a relationship with a client, use the Privacy commitment and client file consent form to obtain their consent to the collection, use and disclosure of their personal information.	<a href="#">Traditional Chinese</a> <a href="#">Simplified Chinese</a>
<b>Advisor disclosure letter</b> Under various provincial legislation and industry standards you are required to provide written disclosure information about your background and your business to clients. This requirement is intended to increase clients' confidence by allowing them to decide if they're satisfied, you're offering objective advice. We suggest printing the appropriate letter template for review with clients.	<a href="#">Traditional Chinese</a> <a href="#">Simplified Chinese</a>

## Presentations

Planning services for you (PSFY)	<a href="#">PowerPoint [PPS]</a> <a href="#">Presentation guide</a> (English)
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## Business booster meetings

Are you prepared for the new tax changes?	<a href="#">2016 May 31</a>
Maximizing your competitive advantage in the wealth management market	<a href="#">2015 Nov 24</a>
Adapting your business to change	<a href="#">2014 Dec 9</a>
Understanding incorporated investment clients	<a href="#">2014 Sept 30</a>
Sales opportunities and tips	<a href="#">2014 May 13</a>
An overview of critical illness insurance	<a href="#">2014 Feb 11</a>
A powerful tool for people new to Canada	<a href="#">2013 Oct 15</a>

## Sales strategies

<b>Estate transfer +</b> Show clients how they can use permanent life insurance to preserve their capital and enhance net estate values all while taking advantage of tax-free growth (subject to government limits, so long as it stays within the	<a href="#">Tool CH/CHS</a> <a href="#">46-4927 CH</a> (traditional Chinese) <a href="#">46-4927 CHS</a> (simplified Chinese)
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<p>policy). Plus, there's an opportunity to access built-up cash value in the policy.</p>	
<p><b>Estate transfer + partials surrenders diagram</b></p> <p>Shows how a partial surrender using an individually owned insurance policy works.</p>	<p><a href="#">88-2215 CH</a> (traditional Chinese) <a href="#">88-2215 CHS</a> (simplified Chinese)</p>
<p><b>Estate transfer + policy loans diagram</b></p> <p>Shows how a policy loan using an individually owned life insurance policy works.</p>	<p><a href="#">88-2213 CH</a> (traditional Chinese) <a href="#">88-2213CHS</a> (simplified Chinese)</p>