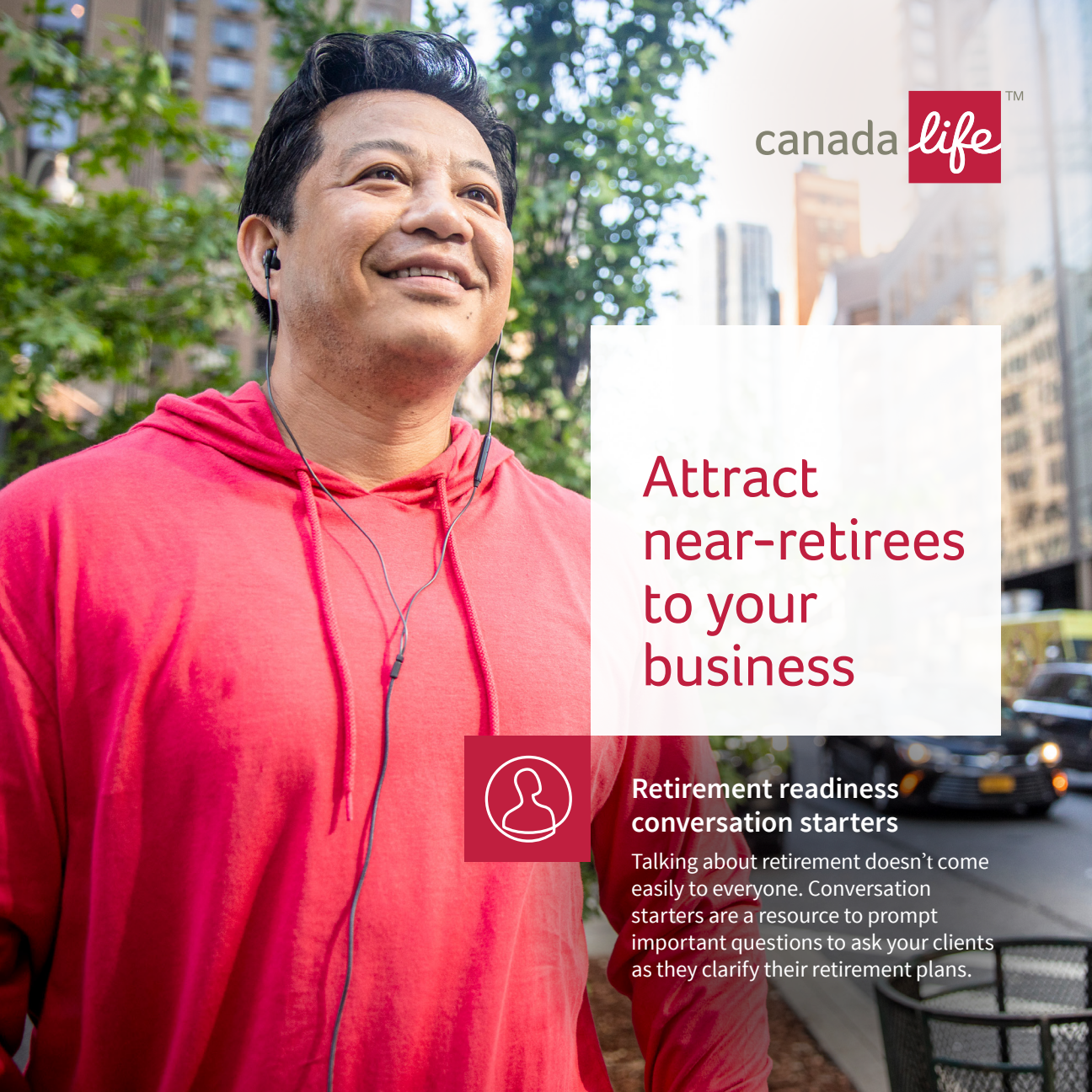

canada life™

Attract near-retirees to your business

Retirement readiness conversation starters

Talking about retirement doesn't come easily to everyone. Conversation starters are a resource to prompt important questions to ask your clients as they clarify their retirement plans.

COVID-19 has changed the way we do business.

Clients enjoy the convenience of speaking with an advisor from the comfort of their home – this could be a permanent shift in the way you give advice.

How can you attract and build your near-retiree client base?

Use these five steps to build your plan.

1 Define your target audience

- Your goal is to target Canadians nearing retirement. Narrowing your focus will help you truly understand your audience's needs, aspirations and goals.
- Who is your ideal client and what's their story? What do they read? Where do they go online? How do they use social media? Answering these questions will bring you closer to knowing your audience well.

2 Build SMART marketing objectives

- Your marketing goal should be **s**pecific, **m**easurable, **a**chievable, **r**elevant and **t**imely. It's also helpful to be flexible as you execute your plan so you can adapt and learn.

3 Create your unique selling point

- How will you stand out from the competition? What things can you do well that others can't? What does the competition do well? How can you learn from them and improve? These questions can help you understand where you add real value to clients.

4 Build awareness with your content

- A website is an important factor in building client awareness for your business. Create a strong "about" section that describes your unique selling point and another page that describes the services you offer. Make sure it's easy to contact you and find your social media accounts.
- Build your brand and credibility and attract new clients with real-life testimonials.
- Use blogs, newsletters, case studies and webinars to diversify your content.
- Make sure your content targets your audience and is engaging, useful and prompts action so you can turn leads into contacts.

5 Attract clients through social media

- Go where your clients are. Facebook is one of the most popular social media platform for people over 65. You might also want to consider WeChat for Chinese-Canadian clients.
- Choose your platforms carefully and perfect your profile and tone of voice in your posts. Watch what competitors do and get a feel for what works and what doesn't. Sharing helpful content is a great way to keep your audience informed and engaged.

For additional resources to support these conversations, visit canadalife.com/campaigns/strength-and-stability or talk to your Canada Life wealth wholesaling team.

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