



Sun Life Singapore

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Creating lasting legacies for  
High Net Worth individuals.

# At Sun Life, we are committed to helping you with your wealth planning and succession needs.

The rules of wealth have changed. And so has wealth planning. In this rapidly changing world, how do you protect and grow your wealth across generations? That's where we come in.

Sun Life is a global leader in asset management, wealth, insurance and health solutions, with C\$1.36 trillion worth of assets under its management\*.

For more than 150 years, we have helped millions of clients around the world achieve lifetime financial security, and lead healthier lives. What's more, our commitment to building a brighter and more sustainable future for communities will guide us in maximising our positive impact on society and the environment over the long term.

So when it comes to insurance solutions to ensure your financial security for generations to come, you can count on us.

## Facts about Sun Life\*

Chartered in Canada in **1865**

In Asia since the **1890s**, and operates in **8 Asian markets** today, including **China, Hong Kong, India, Indonesia, Malaysia, Philippines, Singapore, and Vietnam**

Offices in **28** markets

**85 million** clients worldwide

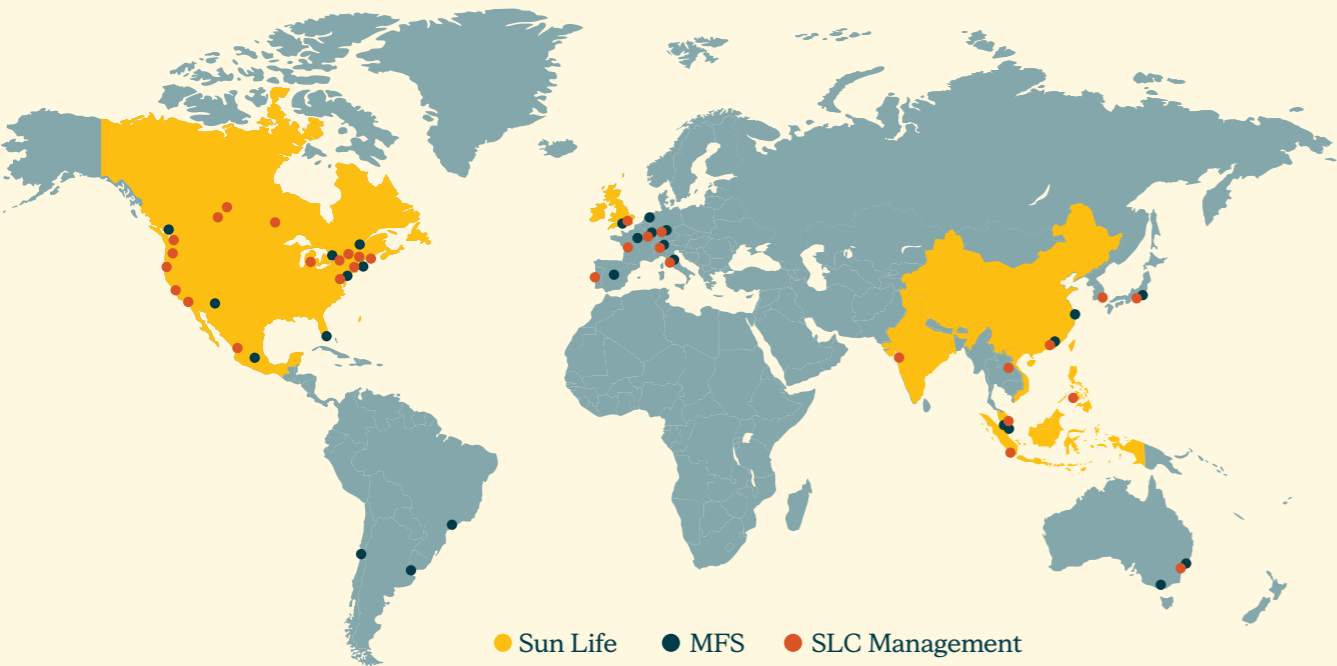
Over **52,000** employees

**97,400** advisors

**C\$1.36 trillion** worth of assets under management

Listed on the **Toronto (TSX), New York (NYSE)** and **Philippine (PSE)** stock exchanges.

\*As of 31 March 2023



# A trusted partner you can count on for generations.

Our relationship with our Clients often lasts through their entire lifetime and beyond. Such an important undertaking is assured by Sun Life's corporate culture: ethical practices, stringent business standards, integrity and respect.

What's more, Sun Life is backed by a strong AA financial rating from S&P — the highest rating among life insurance companies in Singapore. So you can rest assured that you're in good hands.

Rating agency	Credit rating*
Standard & Poor's	AA
Moody's	Aa3
A.M. Best	A+

\* At of 31 March 2023



# Asia's leading High Net Worth insurer.

Sun Life pioneered the introduction of High Net Worth insurance in Asia more than two decades ago. Today, we remain a market leader, providing insurance solutions to Affluent, High Net Worth (HNW) and Ultra High Net Worth (UHNW) Clients to build and ensure their lasting legacy.

In 2020, Sun Life Singapore, Sun Life Hong Kong and Bermuda-based Sun Life International were brought together to form a strategic platform to serve the Affluent, HNW and UHNW client segments in Asia.

To provide value-add to Clients, this strategic platform utilises its various expertise in innovating product solutions, underwriting, technology and human capital, to create synergies in product ideation, processes, and central reporting, bringing best-in-class products and services that can benefit our HNW and UHNW clientele across Asia.



# Create lasting legacies with us.



Sun Life Assurance Company of Canada Singapore Branch ("Sun Life Singapore") received our Direct Insurer (Life) licence from Monetary Authority of Singapore ("MAS") on 14 May 2020.

At Sun Life Singapore, we offer a range of insurance solutions from whole of life to indexed universal life plans to help you achieve your legacy, wealth and business succession needs. Through our network of specialised distribution partners, we provide you with insurance solutions that last a lifetime.

The products issued by Sun Life Singapore comply with Singapore laws and regulations.

As a branch of Sun Life Assurance Company of Canada, Sun Life Singapore benefits from the same financial strength ratings assigned to Sun Life Assurance Company of Canada.

Our strong AA financial rating from S&P is the highest amongst life insurance companies in Singapore\*. So you can be assured of our financial stability and commitment to help you plan a lasting legacy through our insurance solutions.

\* As of 31 March 2023

# Build a giving legacy for a more sustainable future.

We are proud of our history of more than 150 years and recognition as a global sustainability leader.



- Building on our reputation as a trusted and responsible business, we focus on the areas where we can make the greatest impact—increasing financial security, fostering healthier lives, advancing sustainable investing, and being a trusted corporation that’s backed by strong culture and people from diverse backgrounds.
- Since 2012, Sun Life Group has been advocating for Diabetes awareness and prevention, and has committed C\$46.7 million across all the global markets it serves in.
- For many consecutive years, we have been recognised by Corporate Knights as one of the world’s 100 most sustainable corporations.
- Sun Life Singapore has partnered with Community Chest, the philanthropy and engagement arm of National Council of Social Service, to spread the importance of philanthropic giving in local HNW and UHNW communities.

This is done through the Community Chest philanthropy service, where our Clients and business partners will be guided through a structured process by a Community Chest Relationship Manager to start, manage, and track their philanthropy journey.

- Sun Life Singapore has launched its Philanthropic Pledge, where up to 0.5% of the premiums received from the SunBrilliance Indexed Universal Life plan (with a cap of US\$20,000 per policy) will be donated to charity programmes in Singapore.

Our goals to achieve long-term behavioural change through practical programmes contribute to these four areas of need:

**Type 2 Diabetes prevention, care, awareness and education**

**Mental health**

**Community initiatives that drive diversity, equity and inclusion**

**Disaster relief**

Under our pledge, all proceeds will be channelled through Community Chest towards Singapore-based programmes aligned with the four giving pillars.

Through this initiative, we aim to inspire our valued clients to become advocates of philanthropy and build a giving legacy to empower communities in need. We sincerely appreciate your support in enabling us to contribute back to the community.

# Important information:

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