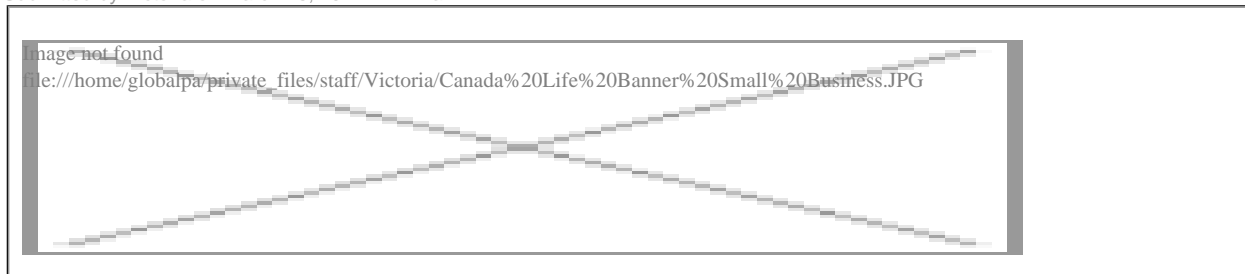




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New resources to help with client conversations on Risk-Managed Portfolios

Submitted by Victoria on March 26, 2021 - 11:12am



Small business owners are the fastest growing segment in the high-net-worth market. While they're focused on running a successful business, they can benefit a lot from having expert guidance on their personal finances. Canada Life Risk-Managed Portfolios can help them preserve, protect and grow their personal savings so that they can achieve their financial goals with comfort and confidence.

Top concerns of business owners:

- They tend to neglect their personal financial plans because so much of their time is spent running their business.
- Because running a business involves a lot of risk, they may be uncomfortable with taking on too much risk with their own investments.
- They're experts in their business but need expert help when it comes to investing. That's where you come in!

Talk to these clients about how Risk-Managed Portfolios can help them get significant downside protection with modest growth potential while still allowing them to earn a stable income.



Supporting your client conversations

Use these materials to help you talk to your business owner clients:

- **Client case study:** Shows how the Risk-Managed Conservative Income Portfolio can help a business owner client reach their financial goals
- **Article about the business owner client**
- **Social media posts**

Find these in the client conversations section of the **Risk-Managed Solutions marketing toolkit**.

For more information about Risk-Managed Portfolios, contact a member of your Canada Life Wealth wholesaling team.

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