



*Kristi Buchanan B. Com, CFP, CLU, Financial Advisor, Sun Life Financial*

GREATER VICTORIA

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## KRISTI BUCHANAN, SUN LIFE FINANCIAL

“There is no passion to be found playing small, in settling for a life that is less than the one you are capable of living. “

The quote is Nelson Mandela’s, but for Kristi Buchanan, B.Comm, CFP, CLU, an investment and insurance advisor with Sun Life Financial, it captures her approach to serving her clients – it’s about helping them achieve what they want, today and tomorrow, in a way that makes sense to them.

Taking a full financial needs approach, Buchanan believes it’s essential to first get to know a client, to build a relationship, before asking them to take action for their future. It’s the only way to identify the right course and product solutions to help them realize both their more immediate and their long-term goals.

“I ask a lot of questions,” she says, explaining that through that process, clients themselves will understand more about their own goals and how they would like to achieve them. “You can’t help someone plan without knowing about their lives.”

That said, the process is not overwhelming.

“We spend a lot of time up front because I need to get to know them, then really it’s just a few hours a year to keep the plan up-to-date. It doesn’t take much work to keep it on track and take it to the next step,” Buchanan explains.

This process increases the clients’ understanding of what they need to do and why and alleviates any hesitation they may have. The results are freeing! Instead of worrying – consciously or subconsciously – about their financial future, they can spend their time and energy on other things. “You need to feel good about what you have and that brings peace of mind,” Buchanan explains.

“Clients know what they want, they understand how these things can help them get there and they get excited about it. It’s taking something that can be stressful and turning it into something that’s really exciting.”

Taking a values-based approach to planning recognizes that no two clients’ goals and paths will be the same. It takes creativity, it takes passion and it takes experience.

Taking these journeys with her clients is immensely gratifying.

“My clients become my friends, really,” she reflects. I see people get married, have children, help them through illness or career transitions, even help them become self-employed and really take charge of their lives.

“It’s about helping people follow their journey, whatever that may be.”

Buchanan applies that same enthusiasm to her other passion, Habitat for Humanity, for whom she has arranged two travel/work trips to help build homes in needy communities.

Last year, she and a number of co-workers lent their time and talents to a family in Chacala, Mexico and this year, she’ll be traveling to Guatemala for a similar project. “It’s been one of the most amazing experiences of my life to be involved with that.”

It’s fitting that like her own relationship with her clients, Buchanan appreciates Habitat’s holistic approach to individual and community support.

“I really believe in helping people live the lives they dream about.”



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### PROFILE

Kristi Buchanan *B. Com, CFP, CLU*  
Financial Advisor  
Sun Life Financial

Sun Life Financial  
3962 Borden St., Suite 101  
Victoria, BC V8P 3H8  
Tel: 250-385-1471 ext 2244  
Fax: 250-380-6011  
kristi.buchanan@sunlife.com

