

## *SunAdvantage*<sup>™</sup>

SunAdvantage is a trade mark of Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.

### 1 Plan Sponsor Services Overview

Online Plan Sponsor Services is an efficient and easy-to-use tool for the administration of your Group Benefits Plan.

There's no need to install special software at your site. If your system already includes the following minimum requirements, we can enable Plan Sponsor Services:

1. Windows NT, Windows '95, Windows '98 or Windows 2000
2. An Internet connection with adequate performance (56kb modem or higher)
3. Microsoft Internet Explorer 5.0 or higher
4. 128-bit security encryption

**Does your system meet the above minimum requirements?**       Yes       No

If your answer to the above question is YES, we will be pleased to enable your access to Plan Sponsor Services.

Using Plan Sponsor Services, you will be able to easily and quickly:

- Add plan members and input complete enrolment information, including salary and benefit options
- Update plan member information to reflect any changes to their benefits, employment status or personal information
- Add and change beneficiary information
- Print and view billing statements and administrative reports
- View your plan set-up online
- Download several administrative forms
- Access the Administrator's guide online
- Submit your administrative requests and questions online

Interested in getting connected? Complete and return the following page to:

Sun Life Assurance Company of Canada  
SunAdvantage - Group Client Services  
PO Box 11010 Station A  
Montreal, QC H3C 4T9

If you elect to use Plan Sponsor Services, you will no longer need to forward members' documents such as beneficiary designations or initial member enrolment forms to us. Only in the event of a Life claim will Sun Life Assurance Company of Canada request these documents. If applicable, we will return any such documents currently in our possession after your access to Plan Sponsor Services is enabled.

Also, please note that you will no longer receive your billing statement by mail. If you are not set up with automatic withdrawals, access Plan Sponsor Services, print your monthly statement and mail it with your payments.

Finally, please note that we will no longer issue Wallet ID cards. The Wallet ID cards have been replaced by a new Coverage Summary that you can print online at your convenience.

## 2 Request for Access to Plan Sponsor Services (for SunAdvantage Clients only)

Please PRINT clearly.

Company Name	Policy Number
Do you have a Group Retirement Plan with Sun Life Assurance Company of Canada? <input type="checkbox"/> Yes, indicate GRS Plan # if known: <input type="checkbox"/> No	

Please provide details of all Plan Administrator(s) who will need access to Plan Sponsor Services:

Name	Title	
Mailing Address		
Telephone number (     )	Email address	Preferred language of correspondence? <input type="checkbox"/> English <input type="checkbox"/> French
Name	Title	
Mailing Address		
Telephone number (     )	Email address	Preferred language of correspondence? <input type="checkbox"/> English <input type="checkbox"/> French

### Important Note:

**Access ID and PIN must be kept confidential by Administrator(s) indicated above or any subsequently appointed Administrators and cannot be assigned to others. The Plan Sponsor is responsible for advising Sun Life Assurance Company of Canada of any changes in the Administrator's level of authority (example - termination of employment, new job position).**

**The Plan Sponsor agrees to perform certain administrative functions in accordance with the provisions of the contract, and guidelines and procedures provided to the Plan Sponsor by Sun Life Assurance Company of Canada.**

Authorized signature for the Plan Sponsor X	Date (d/m/y)
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**Return by mail to: Sun Life Assurance Company of Canada  
SunAdvantage - Group Client Services  
PO Box 11010 Station A  
Montreal, QC H3C 4T9**

**Or send by fax: 1-877-823-6605**