

Payee designation change for critical illness insurance policies



Important: You must initial any corrections to the form. If you don't initial all corrections, we could reject your request or it may be delayed.

1 Policy number information

Enter the policy number for which you would like to change the payee designation

Policy number

2 Information about the current owner of the policy

First name	Middle name	Last name	Date of birth (dd-mm-yyyy)	Telephone number
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Is the policy jointly owned, in shared ownership, or co-owned in Quebec? Yes No

First name	Middle name	Last name	Date of birth (dd-mm-yyyy)
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3 Information about the insured person

First name	Middle name	Last name	Date of birth (dd-mm-yyyy)
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4 Payee designation details

- Naming a benefit payee
- Return of premium on death benefit
- Return of premium on cancellation or expiry

Benefit payee

Note: If you designate a payee, you will not receive the critical illness benefit payment.

If there is no living benefit payee, the critical illness insurance benefit will be paid to the owner or the estate of the owner. This is a revocable designation. However, in Quebec, if you name your legal spouse (marriage or civil union) as the beneficiary, this designation will be irrevocable unless you check this box: Revocable

First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)
First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)

Return of premium on death benefit

If there is no living return of premium on death benefit payee, the return of premium on death benefit will be paid to the owner or the estate of the owner. This is a revocable designation. However, in Quebec, if you name your legal spouse (marriage or civil union) as the beneficiary, this designation will be irrevocable unless you check this box: Revocable

Payee information

First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)
First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)

Are you naming a secondary payee? Yes No

Secondary payee information

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4 Payee designation details (continued)

First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)
First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)

Is the payee under the age of 18? Yes No

Please name a trustee. I authorize the trustee to receive any payments on behalf of the payee while under the age of 18 and to apply the proceeds solely for the support, maintenance, education and benefit of such payee at the discretion of the trustee.

Trustee information

First name	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)
First name	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)

Return of premium on cancellation or expiry

Note: If you designate a payee, you will not receive the return of premium on cancellation or expiry payment.

If there is no living return of premium on cancellation or expiry benefit payee, the return of premium on cancellation or expiry benefit will be paid to the owner or the estate of the owner. This is a revocable designation. However, in Quebec, if you name your legal spouse (marriage or civil union) as the beneficiary, this designation will be irrevocable unless you check this box: Revocable

First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)
First name of payee	Middle name	Last name	Relationship to insured person (in Quebec, relationship to owner)

5 | By signing below I, the policy owner, confirm that:

- If I've named new benefit payees, return of premium on death benefit payees and return of premium on cancellation or expiry payees, these will cancel and replace all previous payee appointments.
- Sun Life Assurance Company of Canada is not responsible for the effect of any payee appointment.

Respecting your privacy

Our Purpose is to help our Clients achieve lifetime financial security and live healthier lives. We collect, use and disclose your personal information to: develop and deliver the right products and services; enhance your experience and manage our business operations; perform underwriting, administration and claims adjudication; protect against fraud, errors or misrepresentations; tell you about other products and services; and meet legal and security obligations. We collect it directly from you, when you use our products and services, and from other sources. We keep your information confidential and only as long as needed. People who may access it include our employees, distribution partners such as advisors, service providers, reinsurers, or anyone else you authorize. At times, unless we're prohibited, they may be outside your jurisdiction and your information may be subject to local laws. You can always ask for your information and to correct it if needed. In most cases, you have a right to withdraw your consent, but we may not be able to provide the requested product or service. Read our Global Privacy Statement and local policy at www.sunlife.ca/privacy or call us for a copy.

Sign and date here:

Note: For multiple owners, all owners must sign. If the owner is a company, include the signing officer's name and title. Remember to initial all the corrections you made.

Signature of policy owner (If signing officer, indicate title) X	Signed at (province/state)	Date (dd-mm-yyyy)
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If the policy is jointly owned, in shared ownership, or co-owned in Quebec:

Signature of joint policy owner (If signing officer, indicate title) X	Signed at (province/state)	Date (dd-mm-yyyy)
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For advisor use:

Advisor first name	Advisor last name	Advisor number
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Return to:

Sun Life Assurance Company of Canada
P.O. Box 1601, STN Waterloo
Waterloo, ON N2J 4C5

Policy number
