

Admin requirements Chart

By Product

This chart outlines what's required for each type of insurance application.

PRODUCT	INDIVIDUALLY OWNED – POD	INDIVIDUALLY OWNED – TIC	CORPORATELY OWNED- POD	CORPORATELY OWNED- TIC
Critical Illness	<ul style="list-style-type: none"> • Application • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • TIC payment: via cheque or special withdrawal with banking information • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • TIC payment: via cheque or special withdrawal with banking information • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization
Critical Illness – *Shared Ownership*	<ul style="list-style-type: none"> • Confirm both owners • Confirm base beneficiary, return of premium on cancellation/expiry (ROPC/E) beneficiary, and return of premium on death (ROPD) beneficiary if applicable • Confirm who is paying for base and who is paying for ROPC/E and ROPD • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 			
Sun Term	<ul style="list-style-type: none"> • Application • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • TIC payment: via cheque or special withdrawal w/banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • TIC payment: via cheque or special withdrawal with banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization

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<p>Sun Par 2 (Protector, Accumulator, Accelerator)</p>	<ul style="list-style-type: none"> • Application • Signed illustration • Identity verification section of Application OR form 4830 • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Signed illustration • Identity verification section of Application OR form 4830 • *received within 30 days of Application signed date* • TIC payment: via cheque or special withdrawal with banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Signed illustration • Form 4831 • Form 4545 • Form 5091 • Supporting corporate documents* (please see chart below) • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Signed illustration • Form 4831 *received within 30 days of Application signed date* • Form 4545 • Form 5091 • Supporting corporate documents* (please see chart below) • TIC payment: via cheque or special withdrawal with banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization
<p>UL 2/ UL Pro 2</p>	<ul style="list-style-type: none"> • Application • Signed illustration • Identity verification section of Application OR form 4830 • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Signed illustration • Identity verification section of Application OR form 4830 • 4830 *received within 30 days of Application signed date* • TIC payment: via cheque or special withdrawal with banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Signed illustration • Form 4831 • Form 4545 • Form 5091 • Supporting corporate documents* (please see chart below) • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Signed illustration • Form 4831 *received within 30 days of Application signed date* • Form 4545 • Form 5091 • Supporting corporate documents* (please see chart below) • TIC payment: via cheque or special withdrawal with banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization

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Sun Permanent Life	<ul style="list-style-type: none"> • Application • Identity verification section of application OR form 4830 • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Identity verification section of application OR form 4830 *received within 30 days of application signed date* • TIC payment: via cheque or special withdrawal with banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Form 4831 • Form 4545 • Form 5091 • Supporting corporate documents • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization 	<ul style="list-style-type: none"> • Application • Form 4831 *received within 30 days of Application signed date* • Form 4545 • Form 5091 • Supporting corporate documents* • TIC payment: via cheque or special withdrawal with banking information provided • If using the Sun eApp, and annual payment was selected, an E75 is required for to provide PAC authorization
RHA	<ul style="list-style-type: none"> • Application • Signed illustration 	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • N/A 	N/A

When do you need to submit supporting documents?

As a general rule, if there is more than one involvement at the shareholder, signing officer, or director level, supporting documents are needed. On subsequent levels of ownership, if the ownership stake is 25% or greater, we need supporting documents confirming all shareholders of the additional entity owner.

Sole ownership that has been incorporated

If the same person is the corporation's shareholder, signing officer, and director, no supporting documents are required from the Client.

Sole proprietorship that has not been incorporated

We do not require entity documentation on a 'sole proprietor'. We treat them as an individual Client. Please complete the AML/ATF portion of the application or the *Identity verification, third party determination and politically exposed persons (PEP) for individual owners (4830)* form. You do not need to complete the form 4831. No supporting documents are required from the Client.

Types of documents that might contain the required information to support the existence of the corporation or entity are, **but are not limited to**, the following:

Supporting Documents	
Entity	Document type
Corporations	<ul style="list-style-type: none"> • Shareholder registry • Schedule 50 of their tax return • Meeting minutes • Board resolution document <p>Note: A copy of the Enterprise Register is not valid.</p>
Partnerships	<ul style="list-style-type: none"> • Partnership agreement or limited partnerships; articles of incorporation for the general partner • Articles of association
Trust and Estates	<ul style="list-style-type: none"> • A copy of documents proving the establishment of the entity and confirming the existence of the estate or trust, such as a will, trust deed, or other trust instrument
Other non-corporate entities including un-incorporated not-for-profit entities	<ul style="list-style-type: none"> • Articles of association • Copy of Canada Revenue Agency registration

Note: Supporting documents should clearly identify the shareholder(s) and the percentage of voting shares held