

How to access statements online using the Customer Access Support Tool on Advisor Site

1. Login to advisor site (<https://www.sunnet.sunlife.com/slfadvisor/signin/e/CommonSignin.aspx>)
2. Select **Customer Access Support Tool** under “CLIENT SERVICE TOOLS”

The screenshot displays the Sun Life Advisor Site interface. At the top, there is a navigation bar with the Sun Life logo, a 'Switch view' button, and the text 'Advisor site - Secure'. To the right, there are links for 'Home', 'Contact us', 'Français', 'Secure inbox', 'Personal profile', and 'SIGN OUT'. Below this is a search bar with two 'Search' buttons. A dark blue navigation menu contains the following categories: LIFE, INVESTMENTS, HEALTH, SUPPORTING YOU, MARKETING, STRATEGIES & CONCEPTS, TOOLS & ILLUSTRATIONS, and RESOURCES. The main content area is divided into four columns: CLIENT SERVICE ACTIVITIES, CLIENT SERVICE TOOLS, COMMON FORMS, and COMMON REQUESTS. The 'Customer access support tool' link in the CLIENT SERVICE TOOLS column is highlighted with a red arrow pointing to a red circle containing the number '2'. Two red-bordered boxes contain notices: one about the Life Claims team moving to a new workflow and another about Microsoft no longer supporting Internet Explorer 11.

CLIENT SERVICE ACTIVITIES

- In-force client service standards
- New business status
- New messages
- View activity for a client
- View activity for a contract

CLIENT SERVICE TOOLS

- Activity centre
- Client portfolio
- Customer access support tool**
- Request centre
- Tax slips & receipts

COMMON FORMS

- Beneficiary change (E83)
- Beneficiary change - GIC only (E22)
- Name change/correction (E85)
- Pre-authorized chequing (PAC) authorization (E75)
- Verification of Identity - Individual owners (4830-E)
- Verification of Identity - Entity owners (4831-E)

COMMON REQUESTS

- Replacements/conversions - apply
- Change beneficiary
- Change PAC banking information
- Request a Sun UL in-force illustration
- Change Sun UL Investment mix
- Transfer ownership of a policy
- More requests

The Life Claims team has moved to a new workflow management system. You may notice service delays over the next 4 weeks as the team navigates this change. If you need help urgently, please contact [Julia Sovetts](#).

After June 15, 2022, Microsoft is no longer supporting Internet Explorer 11. If you are currently using Internet Explorer 11, we recommend changing your browser to be sure that web pages display and work as intended.

3. Select FC, or enter advisor number or contract number of statement(s) to be retrieved

The screenshot shows the Sun Life Advisor site interface. At the top, there is a navigation bar with the Sun Life logo, the text "Advisor site - Secure", and links for Home, Contact us, Secure inbox, Personal profile, and SIGN OUT. A search bar is also present. Below this is a dark blue navigation menu with categories: LIFE, INVESTMENTS, HEALTH, SUPPORTING YOU, MARKETING, STRATEGIES & CONCEPTS, TOOLS & ILLUSTRATIONS, and RESOURCES.

The main content area is titled "Customer access support tool". It contains the following text:
"Before we go any further we need to know which advisor you are working on behalf of right now. You can do this by using the drop-down list, by entering the advisor's number, or by entering a contract number."
"If you enter the contract number, we'll assume that the advisor of record on that contract will be the one you want."

The form includes three input fields:
1. "Select a financial centre/office:" with a dropdown menu currently showing "- select -".
2. "Enter an advisor number:" with a blacked-out input field and a small example "(e.g. 999999999)".
3. "Enter a contract number:" with a blacked-out input field and a small example "(e.g. 9999.999-9-91-000004997)".

Below the input fields are "Previous" and "Next" buttons. At the bottom of the page, there is a "Follow us" section with social media icons for Facebook, Twitter, LinkedIn, Google+, and YouTube.

Three red arrows originate from the right side of the form, pointing to a red circle containing the number "3". The arrows point to the dropdown menu, the advisor number field, and the contract number field.

Tool displays search results

Advisor: [REDACTED]

Customer access support tool - Client search results

Please select the client you'd like or start a [new search](#).

Pending Payout Annuities and Personal Health Insurance contract details are not viewable on this site, which means that clients who hold only these products won't be listed here.

Sort table by:

Name	Date of birth	
[REDACTED]	[REDACTED]	owner
[REDACTED]	[REDACTED]	insured

Results page: 1

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4. Click on **View your documents** to see all documents owned by the policyholder

The screenshot shows the Sun Life website interface. At the top left is the Sun Life logo. A navigation bar contains links for Home, Help, Contact us, Secure messages, Access info, Personal info, and a dropdown menu labeled 'Class'. Below the navigation bar, a 'Home' breadcrumb is visible, followed by a 'Welcome' message with a redacted name. The main content area is divided into several sections:

- January 10, 2023 PLEASE READ:** A notification with a small profile picture and an arrow pointing right. Below it, text states: 'We will soon be upgrading your homepage to provide you with an even better online experience. View your segregated fund contract and mutual fund account details on the go with my Sun Life Mobile. Annuity calculator. Money for Life starts with a conversation.'
- My personal insurance and investments:** A section header above a table titled 'Insurance plans'. The table has three columns: 'Contract number', 'Plan', and 'Insured'. The 'Insured' column is redacted with a black box.
- Documents:** A yellow header section featuring an image of a document with a 'NEW' badge. Below the image, the text reads: 'View your documents. More digital documents coming soon.' A red arrow points from this text to a red circle containing the number '4'.
- Make a payment:** A yellow header section with the text: 'Make a payment to an insurance policy. Gives instructions for making a payment to an insurance policy using online banking.'
- View personal insurance policies:** A yellow header section with the text: 'We're testing out a new look for Clients' insurance policies and asking for their feedback. While Clients will see their real policy information, you will be able to view examples of the insurance page.'
- MONEY FOR LIFE NEWSLETTER:** A promotional banner with an image of a man and a woman sitting at a table, with the text 'MONEY FOR LIFE NEWSLETTER' and 'Subscribe now'.

At the bottom left, a message states: 'Adobe Flash Player is no longer supported'.

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5. Click on the **Personal Insurance** tab and select the policy number to view statement

The screenshot shows the Sun Life user interface. At the top left is the Sun Life logo and a 'HOME' link. Below this is a yellow banner with the word 'Documents'. A navigation bar contains three tabs: 'Workplace investments', 'Benefits', and 'Personal insurance'. The 'Personal insurance' tab is highlighted in yellow and has a red arrow pointing to a circled number '5'. To the right of the tabs is a 'Mark all as read' button. Below the navigation bar is a table with the following columns: 'Date added', 'Document name', 'Type', and 'Insured'. The table contains ten rows of data, with the first two columns of each row redacted with black boxes. The document names are either 'Your annual insurance policy statement' or 'Policy contract', and the types are 'Statement' or 'Contract'.

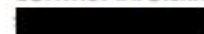
Date added	Document name	Type	Insured
December 6, 2022	- Your annual insurance policy statement	Statement	
November 30, 2022	- Your annual insurance policy statement	Statement	
October 21, 2022	- Your annual insurance policy statement	Statement	
June 8, 2022	- Your annual insurance policy statement	Statement	
January 5, 2022	- Policy contract	Contract	
November 30, 2021	- Your annual insurance policy statement	Statement	
June 8, 2021	- Your annual insurance policy statement	Statement	
December 8, 2020	- Policy contract	Contract	
November 28, 2020	- Your annual insurance policy statement	Statement	

SunUniversalLife

My insurance policy statement
Policy Number: [REDACTED]



CONTACT INFORMATION



Or call our Customer Care Centre
toll-free at 1 877 SUN-LIFE
(1 877 786-5433).

My current coverage

Statement Period: August 9, 2019 to August 8, 2020

Who owns the policy?



Who is insured on the policy?	Type of coverage	Insurance amount(s)
[REDACTED]	Single Life Total Disability Benefit (Protection) to age 75	\$200,000

Policy Summary

Policy Effective Date:
August 9, 2000

Death Benefit Option:
Insurance amount plus policy
fund

Total Policy Death Benefit:
[REDACTED]

Beneficiary:
[REDACTED]

Planned Periodic Payment:
\$3,000.00 Annually

Policy rate of return since policy
effective date:
0.9%

As the **owner**, you can direct who we will pay the insurance benefits to on the death of the **insured person(s)**. You are responsible for all payments required to keep the policy in effect. A **beneficiary** is who you choose (in writing) to receive the death benefit when the insured person(s) dies, while your policy is still in effect.

The **planned periodic payment** is the amount you chose to pay into the policy at set periods of time. While we fully guarantee the policy's cost of insurance rate, we don't guarantee your payment amount and there may be times when you have to make additional payments to keep your policy in effect. For example, if you have chosen indexed or managed accounts and interest earned is negative, additional payments may be needed.

