Sun Life Assurance Company of Canada

Evidence of Insurability Cover Page

Sun Life Financial®

Employer Instructions

Complete this cover page and provide it to the employee. The employee may complete the Evidence of Insurability (EOI) application either online or on paper:

- **Online at www.sunlife-usa.com/planmembers**
  Our secure online system allows employees to provide all of the information needed for Evidence of Insurability in about 10 to 15 minutes. Following completion of the application, the employee receives confirmation by email. The employee then will receive notification of our decision by email or mail.
- **Printable EOI application**
  If submitting the EOI application on paper, the applicant must include this Cover Page with his/her submission. Failure to include a completed Cover Page could delay the EOI process.

Employee/Dependent Information (To be completed by employer)

Employee Name (first, middle initial, last)	Group Policy Number
Social Security Number (last four digits) | | |	Approval Requested for ☐ Employee ☐ Spouse ☐ Dependent Child(ren): No. of Children:

Coverage(s) Subject to Evidence of Insurability (To be completed by employer)

Select coverage(s) for which EOI is required. Fill in Current Amount of coverage, or the Guaranteed Issue (GI) amount of the plan. Then fill in Requested Amount and Amount Subject to EOI. Sign and date here if employee is submitting the printable EOI form.

Life Insurance

	Current Amount of Coverage (or GI)	Requested Amount	Amount Subject to EOI
☐ Employee Basic	$	$	$
☐ Employee Optional	$	$	$
☐ Spouse Basic	$	$	$
☐ Spouse Optional	$	$	$
☐ Child Optional	$	$	$

Other Coverages

☐ Short Term Disability	
☐ Long Term Disability	
☐ Buy-Up LTD:	$

Signature of person completing this cover page (Employer) X	Date

Need help determining EOI? Please see your **Group Policy** and the **Administrator's Guide**.

Employee Instructions

Complete and submit either the Online EOI Application or the Printable EOI Application, but <u>not both</u>.

- **Online EOI Application**
  1. Go to www.sunlife-usa.com/planmembers and click on Evidence of Insurability
  2. Follow the instructions on the web site. Enter height weight, date of birth and medical history for you and any dependents on this application. Use the information supplied by your employer above to complete the Coverage Information section of the online application. Your application will not be submitted until you click the Submit for Review button on the last screen.
- **Printable EOI Application**
  1. Complete pages 1 and 2 of the EOI Application according to the instructions. You may type your answers into the fillable form and then print the document. Please remember to sign and date the form.
  2. Mail or Fax the EOI Application and this Employer Cover Page to us:

MAIL TO: Sun Life Assurance Company of Canada
Group Medical Underwriting, SC7190
15 Rye Street
Portsmouth, NH 03801

-or-

FAX TO: (781) 446-1517

Sun Life Assurance Company of Canada

Evidence of Insurability Application – Health Questionnaire

California / Connecticut / Illinois / Iowa / Kentucky / North Dakota / Ohio / Wisconsin

Sun Life Financial®

I Applicant Information (Please print clearly)

Complete and return pages 1 and 2 of this form, along with the employer cover page to:

Sun Life Financial
Group Medical Underwriting
SC7190
15 Rye Street
Portsmouth, NH 03801

Fax: (781) 446-1517

Your name (first, middle initial, last)	Name of your employer	Group policy no.

Your street address	City	State	Zip Code

Social Security number – –	Daytime phone number	E-mail address

This Application is for: ☐ Employee ☐ Spouse ☐ Child ☐ Male ☐ Female

Name (if different than above)	Date of birth (m/d/y)	Height ft. in.	Weight lbs.

II Health History (The information in sections II, III and IV is confidential and will not be shared with your employer)

Important: You must answer all questions. If you answer "Yes" to any question, please use the space in Section IV on page 2 to provide the details of your condition. Failure to provide the details of your condition will cause a delay in the review of your application.

1. In the past five years, have you:

a. Had transplant surgery, other surgery, injuries or been treated in a hospital? ☐ Yes ☐ No
b. Been treated for alcoholism or advised by a physician to change your drinking habits? ☐ Yes ☐ No
c. Used heroin, marijuana, cocaine, LSD, amphetamines, or any other narcotic? ☐ Yes ☐ No
d. Been off work for more than five consecutive days due to illness or injury? ☐ Yes ☐ No
e. Lost 20 lbs. or more over a 12 month period? ☐ Yes ☐ No

2. In the past five years, have you been diagnosed with, treated for or had any symptoms relating to any of the conditions listed below?

a. Dizzy spells, epilepsy, a nervous or neurological disorder, migraines or a mental disorder ☐ Yes ☐ No
b. Asthma, bronchitis, emphysema, chronic cough, shortness of breath, Chronic Obstructive Pulmonary Disease (COPD) or lung disorder ☐ Yes ☐ No
c. Abnormal blood pressure, chest pain, heart murmur, heart disease or heart attack ☐ Yes ☐ No
d. Ulcer, liver disorder, colitis, diarrhea or any complaint of the digestive organs ☐ Yes ☐ No
e. Arthritis, gout, rheumatism, back disorder, disc disease or joint or bone disorder ☐ Yes ☐ No
f. Cancer, tumor, enlarged glands, enlarged lymph nodes or lupus ☐ Yes ☐ No
g. Sugar in urine, diabetes, kidney or bladder disorder ☐ Yes ☐ No
h. Anemia, blood vessel disease, bleeding or any other blood disease or disorder ☐ Yes ☐ No
i. Disorders of the eyes or ears ☐ Yes ☐ No
j. Chronic fatigue or fibromyalgia ☐ Yes ☐ No

3. In the past five years, have you been diagnosed with or treated by a licensed medical physician for Acquired Immune Deficiency Syndrome (AIDS)? ☐ Yes ☐ No

4. Are you currently pregnant? ☐ Yes ☐ No

Continued on next page

III Activities

Important: If you answer "Yes" to any question, use the space in section IV to list each activity, how often you participate in it and the last time you participated in it.

Do you engage in any of the following activities?

a. Skydiving ☐ Yes ☐ No
b. Scuba diving ☐ Yes ☐ No
c. Vehicle or boat racing ☐ Yes ☐ No
d. Piloting an aircraft ☐ Yes ☐ No

IV Detail (Provide detail below about any "Yes" answer from sections II and III.)

Question number	Description/History of Condition (e.g. high blood pressure, recent BP reading etc.)	Date Condition Began	Duration of Condition/ Treatment	Treatment	Fully Recovered?
					☐ Yes ☐ No
					☐ Yes ☐ No
					☐ Yes ☐ No

If you need more room, check here ☐ and attach a separate sheet.

V Signature

Please read the Certification and sign and date the form below.

If an Authorization form is included in this package, please remember to sign and date all pages of the form and return it with your completed EOI Application.

Certification

I hereby certify, to the best of my knowledge and belief, that:

- The information I have provided in the Evidence of Insurability (EOI) Application is true, accurate and complete.
- I have read, or had read to me, the completed EOI Application and understand that any false statements or misrepresentation made in it may result in a loss of coverage under the Group Insurance Policy.
- I have read or had read to me the Fraud Warning:

  Fraud Warning: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

I also hereby confirm my understanding that:

- My EOI Application may be denied and I may be refused insurance if Sun Life Assurance Company of Canada ("The Company") determines that I am not insurable. If The Company determines that I am not insurable, it will explain in writing the basis of its determination.
- I may ask The Company in writing to: (a) obtain certain information from the EOI Application file relating to me (a fee may be charged); (b) correct, amend or delete information in the EOI Application file relating to me (as permitted by applicable law); (c) file my own statement of facts if I believe any information in the EOI Application file relating to me is incorrect; and (d) provide me with a copy of my EOI Application.
- If I have any questions regarding my EOI Application, I can write to Sun Life Assurance Company of Canada, Group Medical Underwriting., SC 7190, 15 Rye Street, Portsmouth, NH 03801.

Signature of Employee X	Date signed
Signature of Spouse (If Application is for spouse) X	Date signed