

Sun GIF Solutions - Request to add Estate and/or Income Series

Sun GIF Solutions allows the owner/planholder(s) to have multiple guarantee series within one contract. This form is required to add Estate and/or Income Series units for the first time to an existing contract. **The Order ticket – Sun Life Guaranteed Investment Funds (4610-E) form is also required and must be submitted with this form.**

This form may only be used if the registration type for the new Estate Series and/or Income Series is the same as the existing contract. The existing annuitant, successor annuitant or successor owner/planholder (where applicable), beneficiary and trade authorization (if dealer/distributor agreement permits) will apply to the new series.

Owner/planholder information

Contract number		
Owner/planholder's last name	First name	Middle name
Joint owner's last name (if applicable)	First name	Middle name

Guarantee series

Estate Series and/or Income Series

Lifetime guaranteed income option

- For Income Series only and cannot be changed.
- Select the joint life income option for income to continue after the death of the annuitant. It is recommended that you name the annuitant/planholder's spouse as successor annuitant/planholder for non-registered, RRIF and TFSA contracts.

Single life income option (must be the annuitant).

Joint life income option (must be the annuitant's spouse or common-law partner as defined by the Income Tax Act (Canada)).

Provide details below.

Last name	First name	Middle name
Date of birth (dd-mm-yyyy)		

Acknowledgment/authorization

Mandatory – All owners/planholders and joint life (if applicable) must read and sign this section.

I (We) agree to have my (our) advisor send the current supplement for the guarantee series selected to me (us) electronically.

I (We):

- authorize the purchase of Estate Series and/or Income Series units as requested,
- agree that this will be considered a purchase under the existing Sun GIF Solutions contract indicated in the **Owner/planholder information** section,
- acknowledge having received, read and agreed to the provisions in Respecting your privacy in this application and authorize Sun Life Assurance Company of Canada to obtain, use, and transmit to its agents, distribution partners and service providers, personal information about me/us for the purpose of the administration, processing and servicing of this policy,
- request that all documents delivered to me (us) in connection with this contract to be written in English. Je (Nous) demande(ons) que tous les documents qui me (nous) sont remis avec ce contrat soient rédigés en langue anglaise,
- acknowledge that any beneficiary designation, successor owner designation, transfer of ownership or collateral assignment and transaction authorization (if dealer/distributor agreement permits) of the contract will apply to these new units, and
- **acknowledge receipt (either electronically or paper) of the current supplement for the guarantee series selected.**

DEFKSLF105



Acknowledgement/authorization (continued)

Owner/planholder's signature X	Date (dd-mm-yyyy)	
Joint owner's last name (if applicable) X	Date (dd-mm-yyyy)	
Joint life's signature (must be the spouse of the annuitant)* X	Date (dd-mm-yyyy)	
Entity signing officer's signature X	Job title	Date (dd-mm-yyyy)
Entity signing officer's signature X	Job title	Date (dd-mm-yyyy)
Parent/guardian's signature ** X	Date (dd-mm-yyyy)	

*Required when making first premium payment to Income Series.

**Parent/guardian's signature is only required where the annuitant is different from the owner and is under the age of 16 (18 in Quebec) or for in trust for contracts where the beneficial owner is under the age of 16 (18 in Quebec).

Advisor information and acknowledgement

Mandatory – Advisors must read, complete and sign this section.

Advisor's last name	First name	
Dealer/distributor's code/number	Advisor's code/number	Telephone number
Advisor's signature X	Province	Date (dd-mm-yyyy)
Supervisor's signature (if applicable) X		

Respecting your privacy

Respecting your privacy is a priority for the Sun Life Financial group of companies. We keep in confidence personal information about you and the products and services you have with us to provide you with investment, retirement and insurance products and services to help you meet your lifetime financial objectives. To meet these objectives, we collect, use and disclose your personal information for purposes that include: underwriting; administration; claims adjudication; protecting against fraud, errors or misrepresentations; meeting legal, regulatory or contractual requirements; and we may tell you about other related products and services that we believe meet your changing needs. The only people who have access to your personal information are our employees, distribution partners such as advisors, and third-party service providers, along with our reinsurers. We will also provide access to anyone else you authorize. Sometimes, unless we are otherwise prohibited, these people may be in countries outside Canada, so your personal information may be subject to the laws of those countries. You can ask for the information in our files about you and, if necessary, ask us in writing to correct it. To find out more about our privacy practices, visit www.sunlife.ca/privacy.

ANY AMOUNT THAT IS ALLOCATED TO A SEGREGATED FUND IS INVESTED AT THE RISK OF THE CONTRACT OWNER AND MAY INCREASE OR DECREASE IN VALUE.

Contact information

Toll Free English: 1-844-753-4437 (1-844-SLF-GIFS)
Toll Free French: 1-844-374-1375 (1-844-FPG-IFSL)
Fax: 1-855-247-6372

Sun Life Assurance Company of Canada
30 Adelaide Street East, Suite 1
Toronto, ON M5C 3G9 Canada