

# Transaction authorization – Sun Life Guaranteed Investment Funds



This transaction authorization (TA) form can only be used for the contract number(s) provided on the form. A separate TA must be signed for any contracts not included on this form.

Sun Life Assurance Company of Canada – 30 Adelaide Street East, Suite 1 Toronto, ON M5C 3G9 Fax: 1-855-247-6372

## Owner's information

Contract number(s)		Date (dd-mm-yyyy)
Owner's last name	Middle name	First name

## Type of transactions

With this TA, you authorize your advisor named below (the “advisor”), to instruct Sun Life Assurance Company of Canada (Sun Life) on your behalf to process **only** the following transactions:

- new premium deposits
- switches between funds
  - this does not include DSC to FEL requests. The order ticket must be used as these requests may impact the guarantees and require a client signature for each request.
- resets – Sun Protect GIF maturity guarantee
- setup\* and modification of pre-authorized chequing (PAC) /systematic withdrawal plans (SWP) including:
  - increasing or decreasing the amount
  - changing the frequency
  - changing funds
  - restarting within 12 months of stopping
  - one-time PAC
- redemptions, up to a maximum of \$50,000\*\* gross for each request, with the proceeds delivered to your:
  - address currently on file with Sun Life; or
  - banking information already on file with Sun Life

\* If banking information is on file for this contract, no client signature(s) is required to setup a PAC. However, if the request is a first time PAC purchase into Sun GIF Solutions Estate or Income Series, client signature(s) is mandatory regardless of TA.

\*\* Redemptions over \$50,000 gross require a client signature and a signature guarantee

## General provisions

### Before granting this transaction authorization, you should consider the following:

1. When you sign this TA, you are authorizing your advisor you named on this form to request any transactions on your behalf, according to your instructions.
2. Sun Life relies on this TA and assumes that your advisor named on this form is acting on your behalf and has your authorization to do so.
3. Keep a record of all instructions you give to your advisor and check your confirmation statements to ensure the transactions match your instructions. Contact your advisor if you have any questions.
4. Your advisor will review this form with you before you sign it and answer any questions you have.
5. You may revoke this TA by providing written notice to Sun Life.
6. This TA will end immediately if Sun Life receives:
  - a. notice of your death;
  - b. written notice or evidence of your mental incapacity or bankruptcy;
  - c. a change in your advisor of record on your contract(s);
  - d. notice of the bankruptcy of your advisor; or
  - e. a new TA.
7. This TA replaces any previous TA.
8. Sun Life may refuse to accept or process transactions under this TA.
9. This TA does not apply to contracts with an irrevocable beneficiary.

### Owner's authorization

I/We authorize Sun Life and any of their agents to act on instructions from my advisor if they reasonably believe my advisor received these instructions orally or in writing from me in accordance with this TA. These instructions are limited to transactions listed in the **type of transactions** section.

Contract owner's signature X	Date (dd-mm-yyyy)
Joint contract owner's signature X	Date (dd-mm-yyyy)

### Advisor's acknowledgement

I acknowledge that I have reviewed this TA and the general provisions with the contract owner(s) and witnessed the contract owner(s)'s signature above. I further acknowledge that only transactions specifically authorized by the contract owner(s) under this TA may be carried out on behalf of the contract owner(s).

Advisor's last name	First name	Dealer and advisor number
Advisor's signature X		Date (dd-mm-yyyy)

#### Contact information:

Toll Free English: 1-844-753-4437  
Toll Free French: 1-844-374-1375  
Fax: 1-855-247-6372  
[www.sunlifeglobalinvestments.com](http://www.sunlifeglobalinvestments.com)

#### Return to:

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