

# Client consent to electronic delivery of documents and notices



## Purpose:

- By completing this form you are consenting, or revoking consent, to receive official documents and notices associated with your policy/accounts electronically from Sun Life Financial.

Enter one account number  
(to uniquely identify the client's portfolio)

## 1 Client information

\* Mandatory fields

Client first name*	Last name*
Joint client first name (if applicable)*	Last name*
Email address*	

## 2 Authorize consent

I agree to the electronic delivery of documents and notices

If I select "I agree to electronic delivery of documents and notices" above, I agree to the following terms and conditions.

I will get official documents and notices electronically from these Sun Life Financial companies:

- Sun Life Assurance Company of Canada
- Sun Life Financial Distributors (Canada) Inc.
- Sun Life Financial Trust Inc.
- Sun Life Financial Investment Services (Canada) Inc.

Official documents and notices that I may get electronically include:

- Fund Facts, policy/account statements, trade confirmations, contracts, policy information, Know Your Client (KYC) update letters, and other client notifications for personal insurance and investment products
- Claim statements and other client notifications for workplace benefits
- Pension plan statements and other client notifications for workplace investments
- Tax slips and contribution receipts

I agree to electronic delivery of documents and notices for any current policy, account or plan I have with Sun Life Financial and any policy, account or plan I may have in the future, including any pension or benefit plan for which Sun Life Financial provides administrative services.

I also confirm that:

- I understand that documents and notices will be delivered to my [mysunlife.ca](http://mysunlife.ca) account. I will be notified by email when they are ready for viewing. If this is for a joint policy or account, I acknowledge that delivery to the email address provided is delivery to each policy or account owner.
- I have the necessary technical ability and electronic resources to access and view the documents and notices. I will require internet access and document viewing software. It is my responsibility to view all documents and notices sent to my [mysunlife.ca](http://mysunlife.ca) account.
- I will advise Sun Life Financial immediately if the email address changes. Sun Life Financial may send paper copies of documents and notices if it receives notice of a failed email delivery.
- If I am unable to successfully download documents and notices, I can request a printed copy to be sent by regular mail.
- I am not required to choose electronic delivery of documents and notices. I can change my mind about electronic delivery at any time by going to [mysunlife.ca](http://mysunlife.ca), calling Sun Life Financial or calling my advisor.
- Sun Life Financial reserves the right to send me paper copies of notices and documents.

## 3 Revoke consent

Complete this section to revoke consent in writing.

I no longer wish to only receive documents and notices electronically.

DLR4772E



**4 Client authorization**

\* Mandatory fields

Client signature* X	Date signed (dd-mm-yyyy)*
Joint client signature (if applicable)* X	Date signed (dd-mm-yyyy)*

**5 Advisor information**

Advisor's first name	Last name	Advisor's rep code
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