

# Application for Portable Group Life Insurance



Please PRINT Clearly

Use this form to apply for Portable Basic Group Term Life and Accidental Death and Dismemberment (AD&D) insurance. Use this application for the following company:

- Sun Life Assurance Company of Canada

Please complete sections 1 through 4, read the acknowledgment, and sign and date the form. Mail the completed form, a copy of your Portability Notice, and a check for the first premium to: **Sun Life Financial, Group Life Portability, SC 3015, One Sun Life Executive Park, Wellesley Hills, MA 02481.** Questions about Portability? Please call 1-800-247-6875.

## 1 General Information

Rates will increase when you reach a new age band. See the Portability Kit or ask your employer for rates and age bands.

### Information about the person being insured

Your name (first, middle initial, last)		<input type="checkbox"/> Male <input type="checkbox"/> Female		Date of birth (m/d/y)	
Residence address (street number & name, apartment or suite)			City	State	Zip
Social Security Number	Work phone number		Home phone number		
X   X   X   X   X					

### Information about the qualifying group policy

Name of group policyholder (i.e. your employer or plan administrator)	Policy number

## 2 Coverage Amounts

See Section 3 of the Portability Notice for the amount of insurance you are eligible to apply for. You may elect to keep the current amount(s)\* of Basic and/or Optional Life coverage you had with your prior employer, or elect a lower amount

You may apply for Accidental Death and Dismemberment (AD&D) only if your employer's plan includes this option.

You may apply for spouse and/or child(ren) coverage only if your employer's plan includes these options. Be sure to write in spouse/child name(s), Social Security number(s) and date(s) of birth. To apply for spouse and child, you must apply for portability for yourself.

Check one box and write in amount under each type of insurance

<b>Employee Basic Life</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$	<b>Employee Optional/Voluntary Life</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$
<b>Employee Basic AD&amp;D</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$	<b>Employee Optional/Voluntary AD&amp;D</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$
<b>Spouse Basic Life</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$	<b>Spouse Optional/Voluntary Life</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$
<b>Spouse Basic AD&amp;D</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$	<b>Spouse Optional/Voluntary AD&amp;D</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$
<b>Child Basic Life</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$	<b>Child Optional/Voluntary Life</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$
<b>Child Basic AD&amp;D</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$	<b>Child Optional/Voluntary AD&amp;D</b> <input type="checkbox"/> Elect to keep current amount <input type="checkbox"/> Elect a lower amount	Amount elected \$

Spouse name (First, M.I., Last)	Social Security number x x x x x	Date of birth (m/d/y)
Child name	Social Security Number x x x x x	Date of birth (m/d/y)
Child name	Social Security Number x x x x x	Date of birth (m/d/y)

\* subject to a policy maximum of \$500,000

### Premium payment

Amount enclosed \$	How would you prefer to pay premiums? <input type="checkbox"/> Annually <input type="checkbox"/> Semi-annually <input type="checkbox"/> Quarterly
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### 3 Beneficiary Designation

If you do not name a beneficiary or if no beneficiaries are alive at the time of your death, proceeds will be payable to your estate.

Proceeds for the loss of a covered family member will be paid to you.

Under Secondary Beneficiaries, list the individuals who should receive proceeds only if ALL of your Primary Beneficiaries are not living at the time of your death.

On the lines below, list the individual(s) who you want to receive Portable Basic Group Term Life and Optional Group Term Life Insurance proceeds in the event of your death. You may specify as many individuals as you like, but the total shares must equal 100% for your Primary Beneficiaries and 100% for your Secondary Beneficiaries. If you need additional space, check here  and attach a separate sheet.

Primary Beneficiaries		Social Security Number	Relationship to the person being insured	Percent share of proceeds
Name (first, middle initial, last)	Address (street, city, state, zip)			
1.		(last four digits only)		%
2.		(last four digits only)		%
				<b>Total = 100%</b>

Secondary Beneficiaries		Social Security Number	Relationship to the person being insured	Percent share of proceeds
Name (first, middle initial, last)	Address (street, city, state, zip)			
1.		(last four digits only)		%
2.		(last four digits only)		%
				<b>Total = 100%</b>

### 4 Acknowledgment and Signature

To begin processing of your portable coverage, Sun Life Assurance Company of Canada must receive this signed Application, any other required documentation, and your first premium payment within 31 days of your termination date.

**You must read and sign to apply for coverage.**

I/We understand and agree that: (1) The answers and statements in this Application will be the basis for and become part of any insurance certificate issued as a result of this Application. (2) The certificate issued will replace the coverage provided by the qualifying group policy indicated in Section 1 of this Application. (3) No insurance requested in this Application will be effective until Sun Life Assurance Company of Canada approves this Application. (4) I am not eligible for a Portability Certificate if I have left my employment due to retirement, sickness or injury. (5) A claim may be denied in accordance with the Incontestability provision of the Portability Certificate if the statements in this Application are not complete and true.

**Fraud Warnings:** Please read the fraud warning below before signing this form. Where noted, state law requires that we notify you of the following:

**Fraud Warning (except as specified below):** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**For Colorado the following notice applies:** It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance, and civil damages. Any insurance company or agent of an insurance company who knowingly provides false, incomplete, or misleading facts or information to a policyholder or claimant for the purpose of defrauding or attempting to defraud the policyholder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

**For District of Columbia the following notice applies:** WARNING: It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits, if false information materially related to a claim was provided by the applicant.

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**For Florida the following notice applies:** Any person who knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree.

**For Maryland the following notice applies:** 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 as determined by a court of competent jurisdiction.

**For New Jersey the following notice applies:** Any person who knowingly includes any false or misleading information on an application for an insurance policy is subject to criminal and civil penalties.

**For Ohio the following notice applies:** Any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement is guilty of insurance fraud.

**For Oklahoma the following notice applies:** WARNING: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony.

**For Oregon the following notice applies:** Any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement may have violated state law.

**For Pennsylvania the following notice applies:** Any person who knowingly and with intent to defraud any insurance company or any other person files an application for insurance, 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.

**For Washington, Virginia, Maine, and Tennessee the following notice applies:** It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits.

**For Vermont the following notice applies:** Any person who knowingly presents a false statement in an application for insurance may be guilty of a criminal offense and subject to penalties under state law.

No insurance requested in this Application will become effective until Sun Life Assurance Company of Canada approves the Application, notifies you of its approval, and receives the first premium payment from you. If you submit the initial premium payment with the Application and Sun Life denies the Application, Sun Life will refund it. If your Application is approved, Sun Life will bill you for future premium payments.

Signature of employee X	Today's date
Signature of spouse (if also applying for coverage) X	Today's date