

Election of method of settlement and statement of claim

1 Information about the deceased

Is the deceased the:

☐ Member ☐ Spouse ☐ Dependent

Deceased's last name		First name	
Address (street number and name)		Apartment or suite	
City	Province		Postal code
Social Insurance Number	Date of birth (dd-mm-yyyy)	Marital status at death	
Cause of death		Relationship to member (if not member)	

2 Member information

Policy number	Social Insurance Number	Member ID number	
Member's last name	First name	Date of birth (dd-mm-yyyy)	
Address (street number and name)		Apartment or suite	
City	Province		Postal code

Name and address of all Physicians who attended the deceased in the past five years.

Name and addresses	Date (dd-mm-yyyy)	Reason
	— —	
	— —	
	— —	
	— —	

Name and addresses of all hospitals or institutions where the deceased was treated in the past five years.

Hospital/Institution	City/Town	Date (dd-mm-yyyy)
		— —
		— —
		— —
		— —

If death occurred within two years of the date of coverage becoming effective or increased, please complete the following:

Please attach newspaper clippings; Coroner's report and/or Police report, if available.

Are you claiming an accidental death benefit? ☐ Yes ☐ No

If yes, please describe the circumstances surrounding the death.

Name of police officer	Name of police station
Automobile registration number	Driver's Licence number

3 Information about the claimant

Please PRINT name. Please attach an original death certificate or a certified copy. A Physician Statement is required, if death occurred within two years of the date of coverage becoming effective or increased; and/or for any optional benefit exceeding \$250,000 where the benefit has been in effect less than five years.

Claimant's last name		First name	
Address (street number and name)		Apartment or suite	
City	Province		Postal code
Telephone number — —		Social insurance number 	
Date of birth — —	Relationship to deceased		
Claimant's basis of claim <input type="checkbox"/> Named beneficiary <input type="checkbox"/> Trustee <input type="checkbox"/> Beneficiary's Guardian <input type="checkbox"/> Estate Representative <input type="checkbox"/> Other, please specify _____ <input type="checkbox"/> I elect a lump sum payment <input type="checkbox"/> Please arrange for an advisor to contact me at _____			

4 Authorization and signature

I authorize Sun Life Assurance Company of Canada, the plan administrator(s), and their advisors and service providers to collect, use and disclose information needed for underwriting, administration and adjudicating claims under this insurance coverage relating to _____ (the life insured) with any person or organization who has relevant information pertaining to this claim including health professionals, government agencies, provincial health-care plans, institutions, investigative agencies, insurers and reinsurers.

I understand that information pertaining to this claim may be reviewed in the event that this plan is audited.

A photocopy or electronic version of this authorization shall be as valid as the original.

I consent to the use of my Social Insurance Number for tax-reporting purposes in connection with this claim.

Location signed (city)	Location signed (province)	Date (dd-mm-yyyy) — —	Claimant's signature X
Address (street number and name)			Apartment or suite
City	Province		Postal code
Telephone number (home) — —	Telephone number (office) — —		

Please return the fully completed form and supporting documents to:

Sun Life Assurance Company of Canada
Attn: Group Life Claims
1155 Metcalfe
Montreal QC H3B 2V9

5 Respecting your privacy

Your privacy is important to us. We may leverage our strengths in our worldwide operations in our negotiated relationships with third-party providers to help us service some of our customers. In some instances our employees, service providers, agents, reinsurers and any of their service providers, may be located in jurisdictions outside Canada, and your personal information may be subject to the laws of those foreign jurisdictions.

To find out about our Privacy Policy, visit our website at www.sunlife.ca, or to obtain information about our privacy practices, send a written request by email to privacyofficer@sunlife.com, or by mail to Privacy Officer, Sun Life Financial, 225 King St. West, Toronto, ON M5V 3C5.

Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies, is committed to keeping your information confidential.