



Digital Beneficiary Campaign

Web – Review Beneficiary

Hello %DISPLAY_FIRST_NAME%



Have you reviewed your beneficiary recently?

You don't have to change anything. Simply make sure the information is accurate to reflect your current wishes.



[Review my beneficiary](#)

[Maybe later](#)

Web – Add Beneficiary

Hello %DISPLAY_FIRST_NAME%



We noticed you haven't named a beneficiary.

Protect the future of your loved ones - it's simple in 3 easy steps.



[Name my beneficiary](#)

[Maybe later](#)



Web – Active Alert Tile

Action alert: Name a beneficiary to your plan today.

In just a few steps, you can secure your loved ones' future.

[➤ Update now](#)



EMAIL – GB / Choices Protection

Review Beneficiary

Subject line: <First Name>, have you experienced any life events recently?

Pre-header: Review your beneficiary. It's easier than you think. Sign in now!



Can't see this email? [View online](#)



Have you reviewed your beneficiary recently?

Hello <%=name%>,

Complete your 1-minute beneficiary check. Don't worry, you don't have to change anything. Simply make sure the information on your account is up to date.¹

Here's your annual reminder to ensure your life benefits go to the people you love.

[Review my beneficiary](#)

Note: In some instances, a beneficiary may be listed as "irrevocable". Refer to the beneficiary tool for all details.

Sincerely,
Your team at Sun Life

¹ [Why name a beneficiary?](#)

Group Benefits and Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies.

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Life's brighter under the sun



EMAIL – GB / Choices Protection

Missing Beneficiary

Subject line: <First Name>, your account is missing information. Don't wait.

Pre-header: Add a beneficiary in 3 easy steps. Sign into your account.



Can't see this email? [View online](#)



We noticed you haven't named a beneficiary.

Hello <%=name%>,

It's a good idea to review and update your beneficiary information. The top reasons why it's important is your beneficiary could receive the money directly, rather than through your estate.¹ Avoid risking your assets and ensure your life benefits go to the people you love.

Don't worry, we've made it really easy in only 3 steps!

Step 1

[Sign in now](#)

Step 2

Click on 'Beneficiary information'.

Step 3

Update your details here. That's it!

Note: In some instances, a beneficiary may be listed as "irrevocable". Refer to the beneficiary tool for all details.

Sincerely,
Your team at Sun Life

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EMAIL – GRS / Choices Wealth

Review Beneficiary

Subject line: <First Name>, have you experienced any life events recently?

Pre-header: Review your beneficiary. It's easier than you think. Sign in now!



Can't see this email? [View online](#)



Have you reviewed your beneficiary recently?

Hello <%=name%>,

Complete your 1-minute beneficiary check. Don't worry, you don't have to change anything. Simply make sure the information on your account is up to date.¹

Here's your annual reminder to ensure your Sun Life products are designated to the right people.

[Review my beneficiary](#)

Note: In some instances, products may have spousal priority or a beneficiary may be listed as "irrevocable". Refer to the beneficiary tool for all details.

Sincerely,
Your team at Sun Life

¹ [Why name a beneficiary?](#)

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EMAIL – GRS / Choices Wealth

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Hello <%=name%>,

It's a good idea to review and update your beneficiary information. The top reasons why it's important is your beneficiary could receive the money directly, rather than through your estate.¹ Avoid risking your assets and name a beneficiary to protect their financial future.

Don't worry, we've made it really easy in only 3 steps!

Step 1

[Sign in now](#)

Step 2

Click on 'Beneficiary information'.

Step 3

Update your details here. That's it!

Note: In some instances, products may have spousal priority or a beneficiary may be listed as "irrevocable". Refer to the beneficiary tool for all details.

Sincerely,
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EMAIL – Joint

Review Beneficiary

Subject line: <First Name>, have you experienced any life events recently?

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Can't see this email? [View online](#)



Have you reviewed your beneficiary recently?

Hello <%=name%>,

Complete your 1-minute beneficiary check. Don't worry, you don't have to change anything. Simply make sure the information on your account is up to date.¹

Here's your annual reminder – designate your beneficiary. Make sure to protect the future of the people you love.

[Review my beneficiary](#)

Note: In some instances, a beneficiary may be listed as “irrevocable”. Refer to the beneficiary tool for all details.

Sincerely,
Your team at Sun Life

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EMAIL – Joint

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Step 1

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Step 2

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Step 3

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