

Telephone access for client inquiries or transactions change form



1. Information about the policy owner

First name of policy owner	Middle name	Last name	Policy no.
Address			City
Province	Postal code	Country	

2. Choose one of the following options:

Telephone access not permitted for client inquiries or transactions

Sun Life Assurance Company of Canada will only release information or process transactions on your policies when we have received your written request. If you contact Sun Life Financial using the telephone we will not release information to you or conduct transactions for you.

Telephone access permitted for client inquiries or transactions

Sun Life Financial is permitted and will release information or process transactions on your policies when we receive your request, either in writing or over the telephone.

3. Please sign here to confirm your direction to either permit or restrict the release of information or process transactions if you contact us by telephone to our Customer Care Centre.

Signature of the owner of the policy X		
Date (yyyy-mm-dd)	Signed at (city)	Signed at (province)

Please return the signed form to:

Sun Life Assurance Company of Canada
227 King Street South
P.O. Box 1601, STN Waterloo
Waterloo, ON N2J 4C5