

Sun Retirement Health Assist – policy review checklist



Policy no.

Policy owner's first name	Middle initial	Last name
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My advisor or long term care insurance specialist has:

- Reviewed the importance of Sun Retirement Health Assist coverage with me.
- Reviewed how Sun Retirement Health Assist benefits are triggered.
- Explained the differences between how Sun Long Term Care Insurance and Sun Retirement Health Assist benefits are triggered.
- Reviewed the policy details, features and options to ensure this policy meets my expectations.
 - Weekly benefit amount
 - Benefit period
 - Waiting period
 - Coverage effective date
 - Payment period
 - Premium guarantee
 - Waiver of premium (when the claim is approved)
 - Withdrawable premium fund
 - Automatic Return of premium on death
 - Optional Return of premium on death
 - Inflation protection
- Reviewed any amendments as they appear within the policy.
- Confirmed that all arrangements have been made correctly (e.g. pre-authorized chequing (PAC) information, benefit(s) chosen).
- Discussed when and how to contact Sun Life Assurance Company of Canada if I need to make a claim.
- Ensured that I am happy with the product and my policy.
- Ensured that I have received my policy.

Your signature below confirms you received your policy and that we discussed the items selected on this form.

Location signed (city)	Location signed (province)	Date (dd-mm-yyyy) — —	Signature of policy owner X
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