

Applying with the Product bundling feature

This document covers the steps required in Sun eApp to apply for a special offer. The screenshots you see will vary from those in this document based on the special offer available.

Step 1 – Start a new business application and enter Client details

Start a new business application and enter **Client details** as usual.

Step 2 – Fill out the Product details page

If the Client qualifies for this special offer, a message appears at the top of the page.

Tip! To quickly and easily view any of current Special offers available, click [View special offers for details](#).

Enter the appropriate product information as usual, either manually or by prefilling from an illustration.

Step 3 – Fill out the Product bundling page

1. Under **Choose a bundle**, select the appropriate bundle.

2. Under the **Product** column, select the products the Client wishes to bundle and click **Set up bundle**.

Product bundling

Client details ✓ Choose a bundle

Product details ✓

Product bundling ↻

Purpose of insurance

Beneficiaries

▶ Evidence for Joe Client

▶ Payment

Attachments

Summary 🔒

Requirements 🔒

Sign and submit 🔒

Confirmation 🔒

▼ Set up a bundle 🗑️

Choose a bundle

2025 Term and CII Special Offer ▼

Select all required products to complete your bundle, then click 'Set up bundle' to continue.

Product	Insured(s)	Coverage amount	Premium summary
<input checked="" type="checkbox"/> Sun Life Evolve Term	Joe Client	\$250,000	Total cost per month \$24.08 Total cost annually \$267.50
<input checked="" type="checkbox"/> Sun Critical Illness Insurance	Joe Client	\$100,000	Total cost per month \$38.70 Total cost annually \$430.00

Set up bundle

A message appears reminding you that to ensure the Client receives bundle benefits, you must submit all products within the bundle together before the campaign expiry date.

You also see that this product has a discounted premium.

Tip!

On the **Product details** page, if you added products that are not yet included in a bundle, you can create a new bundle by clicking **Add a bundle** and repeating the step above. For example, if you had a couple and added a Term product for each and a CII for each, you'd create one bundle for each person in the couple.

Product bundling

- Client details ✓
- Product details ✓
- Product bundling ↻
- Purpose of insurance
- Beneficiaries
- Evidence for Joe Client
- Payment
- Attachments
- Summary 🔒
- Requirements 🔒
- Sign and submit 🔒
- Confirmation 🔒

i **2025 Term and CII Special Offer** runs until February 27, 2026. To ensure the client receives bundle benefits, you must submit all products within the bundle together before the campaign expiry date.

2025 Term and CII Special Offer

Product	Insured(s)	Coverage amount	Premium summary
Sun Life Evolve Term	Joe Client	\$250,000	Total cost per month \$24.08 Total cost annually \$267.50
Sun Critical Illness Insurance	Joe Client	\$100,000	Total cost per month \$36.77 Total cost annually \$408.50

⚙️ This product has a discounted premium

➕ Add a bundle

Step 4 – Continue the application

Complete the application as usual until you reach the **Summary** page.

Step 5 – View additional messages

- On the **Summary** page, under the appropriate section, you see a message about the discount. It includes the original premium.

Summary

Client details	✓	Client details		
Product details	✓	Name and involvement	Personal information	Mailing address
Product bundling	✓	Joe Client Owner, Insured	Date of birth: Jan 1, 1990 Male Non-Smoker, Underwriting risk class 3 Province signed in: Ontario	227 King St S Waterloo, Ontario, Canada N2J 4C5
Purpose of insurance	✓			
Beneficiaries	✓			
> Evidence for Joe Client	✓			
> Payment	✓			
Attachments	✓			
Summary	↻	Product details		
Requirements	🔒	▼ Sun Critical Illness Insurance: Joe Client \$408.50/year		
Sign and submit	🔒	Policy number: AA89,350-4		
Confirmation	🔒	Application date: August 29, 2025		
		⚙️ This product has a discounted premium. The original annual premium was \$430.00.		
		How would you like this policy delivered?		
		<input type="radio"/> By advisor <input type="radio"/> By mail		
		Insured(s)	Product	Coverage amount
		Joe Client	Sun Critical Illness Insurance, Term 10	\$100,000
				Guaranteed payment period To age 75
		<input type="checkbox"/> Add special instructions ⓘ		

- On the **Sign and Submit** page, a message reminds you to make sure to submit their applications before the expiry date.

Sign and submit

Client details	✓	<div style="border: 1px solid #f4a460; padding: 5px; margin-bottom: 10px;"> <p>i 2025 Term and CII Special Offer runs until February 27, 2026. To make sure your Client benefits from the offer(s), please submit their application before the expiry date.</p> </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 10px;"> <p>▼ Sun Life Evolve Term: Joe Client 🕒 Signature process pending</p> </div> <p>Policy number: AA89,349-7</p> <p>Files</p> <p> Application - AA89,349-7</p> <p> Evidence for J Client - AA89,349-7</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Items to complete</th> <th style="text-align: left;">Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>eSign</td> <td><input type="radio"/> Not complete</td> <td style="text-align: right;">Open</td> </tr> <tr> <td>Advisor's report</td> <td><input type="radio"/> Not complete</td> <td style="text-align: right;">Open</td> </tr> <tr> <td>Advisor's declaration and notice of disclosure</td> <td><input checked="" type="checkbox"/> Complete eSign and Advisor's report</td> <td style="text-align: right;">Declare and submit</td> </tr> </tbody> </table>	Items to complete	Status		eSign	<input type="radio"/> Not complete	Open	Advisor's report	<input type="radio"/> Not complete	Open	Advisor's declaration and notice of disclosure	<input checked="" type="checkbox"/> Complete eSign and Advisor's report	Declare and submit
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Product details	✓													
Product bundling	✓													
Purpose of insurance	✓													
Beneficiaries	✓													
Evidence for Joe Client	✓													
Payment	✓													
Attachments	✓													
Summary	✓													
Requirements	✓													
Sign and submit	🔄													
Confirmation	🔒													

Step 6 – Complete and submit the applications

Complete the rest of the application as usual and submit the applications.

Tip! When submitting a product bundle application, from the **Sign and submit** page, you see a section for each product. You'll need to send an eSign package for each product and also complete the Advisor's report for each product. However, when it's time to submit the application, you'll **Declare and submit** once for all the products in the special offer.

Sign and submit

- Client details ✓
- Product details ✓
- Product bundling ✓
- Purpose of insurance ✓
- Beneficiaries ✓
- Evidence for Joe Client ✓
- Payment ✓
- FATCA/CRS details ✓
- Attachments ✓
- Summary ✓
- Requirements ✓
- Sign and submit 🔄
- Confirmation 🔒



• The **2026 Term and SunPerm Special Offer** expires on June 30, 2026.

To make sure your Client benefits from the offer(s), please submit their application before the expiry date.

2026 Term and SunPerm Special Offer

Sun Permanent Life: Joe Client

🕒 Advisor declaration pending

Policy number: AA93,429-1

Files

Application - AA93,429-1

Evidence for J Client - AA93,429-1

Joe Client - FATCA CRS - AA93,429-1

Items to complete

Status

Items to complete	Status		
eSign Initiated Mar 10, 2026	✓ Completed	Open	Manage eSign
Advisor's report	✓ Completed	Open	

Sun Life Evolve Term: Joe Client

🕒 Advisor declaration pending

Policy number: AA93,430-8

Files

🔄 One moment, we're generating your PDFs.

Items to complete

Status

Items to complete	Status	
eSign	✓ Completed	Open
Advisor's report	✓ Completed	Open

Declare and submit 2026 Term and SunPerm Special Offer

Advisor's declaration and notice of disclosure Not complete Declare and submit

Unlock and edit 🔓