

# Frequently Asked Questions

## SIMPLIFYING CLIENT PAPERLESS EXPERIENCE

### Have Clients' paperless preferences been changed?

No. The change is to ensure that Clients receive the paperless experience they've requested. If a Client has indicated a preference for paper, the Client will continue to receive paper communications from Sun Life.

### How can Clients indicate their paperless preference?

There are 3 ways for a Client to indicate their paperless preference:

1. [Recommended] Mysunlife.ca: register/sign-in, go to *Profile* → *Preferences* → select *Paper/less*
2. [Recommended] My Sun Life mobile app: register/sign-in, go to *Profile* → *Preferences* → select *Paper/less*
3. For Dealer Clients: The Client consents to electronic/paperless delivery preference during account opening or through form 4772 (*Client Consent to Electronic Delivery of Documents and Notices*).

For additional questions, Clients can call the contact centre for support.

### My Client still wants to be paper. What can we do?

If a Client mistakenly opted in to paperless or has changed their mind, there are two options:

- Option 1: They can register on mysunlife.ca, navigate to *Profile, Preferences*, and select *Paper*. This is the easiest/fastest method and equips your Client with the ability to modify their own preference any time. If they have any difficulties, they can call the contact centre for support.
- Option 2: Alternatively, for Dealer Clients, you can meet with your Client and complete the *Electronic Delivery of Documents and Notices (4772)* form, update the Client's consent in the SV i-App, provide a copy of the document to the Client, and upload all documents (including meeting notes) to the Client file in Salesforce. Note: this will revoke electronic permissions for all documents (including Fund Facts).

### What if my Client wants digital Fund Facts but paper for other documents like statements?

Most of our online Clients today choose to go paperless for all documents. If after completing the 4772 form and receiving their Fund Facts electronically, a Client wishes to receive other documents by paper, they can sign in to mysunlife.ca to change their preference to paper. No consent updates are made in SV i-App. Clients will receive their documents by paper. Advisors can still send Fund Facts electronically.

### Which of my Clients are affected by this?

	Has chosen "paperless"	Has registered for mysunlife.ca	Client experience
No Impact	Yes	Yes	No Client experience change. They continue to not receive paper for key documents
No Impact	No	Yes/No	No Client experience change. They continue to receive paper for all documents
Impacted Group	Yes	No	Client experiences change: They will STOP receiving paper for key documents

**Which documents are affected by this?**

This is only impacting Statements (Insurance/Dealer) and Trade Confirmations (Dealer) currently. Other documents (e.g., booklets, tax slips, letters) will be mailed via paper until they are setup for paperless.

**Do Clients still need to register for mysunlife?**

For paperless Clients, they will receive email notifications when new documents are available online.

They need to register/authenticate on mysunlife.ca should they wish to access their digital documents.

**Are there more paperless changes coming?**

Sun Life is continuing to enhance our digital-first experience, giving Clients faster access to their documents, reducing paper usage, and supporting a more sustainable future.