

Form select tool – Multi-form packages – User guide

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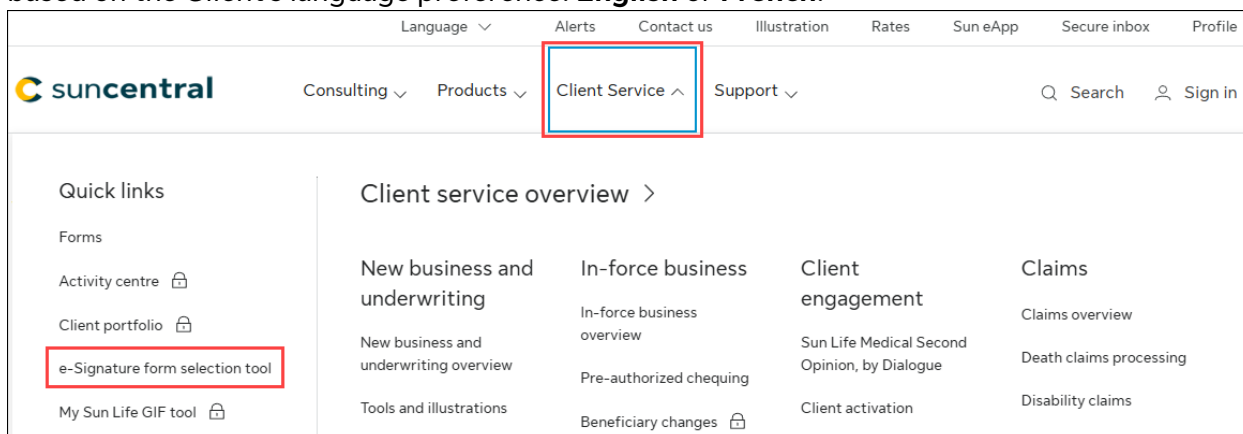
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Introduction

This guide provides instructions on how to use Form selection tool (FST) to send up to five forms within the same line of business through a single eSign package.

Access the FST

1. From Suncentral, under **Client Service** mega menu, select **e-Signature form selection tool**. From the landing page that appears, select the appropriate button based on the Client's language preference: **English** or **French**.



2. From the drop-down list, select an **advisor**.

Tip!

For MAC members only:

- Do not select the MAC ID. Only select the Advisor ID the work is being completed on behalf of. If you select the MAC ID, a "We are sorry..." error message will display. Logout and close the browser and repeat step one (above).
- The tool will not function when attempting to switch to another advisor within the same session. If attempting to complete a form for a different advisor in the MAC, logout and close the browser and repeat step one (above).

3. Click **Next**.

Use the FST

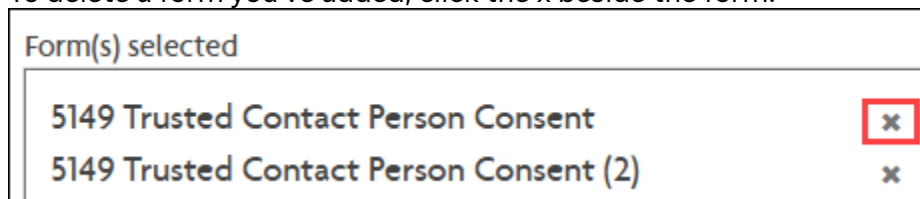
Select the forms and owner(s)

1. From the **Select a category** drop-down list, select the appropriate category.
2. From the **Select a form (maximum of 5 forms)** drop-down list, select the appropriate forms then click **Add Form**. Repeat this step as required. You may add a form multiple times, and you may add up to 5 forms.

Tips!

- Due to technical limitations, some forms can only be added once as part of a multi-form package. The **Add Form** button will be greyed when you try to select the form a second time. Other forms have to be sent in a stand-alone package. In those cases, after you add the first form, the other forms will be greyed out and the message **The selected form can only be sent by itself. No additional form can be added to this package** will appear.
- The forms are listed in numerical order. When a form doesn't have a number, it's listed at the end.
- If you add a form that will require you to send the Evidence Summary to a fund company, all signers in the package need to be the same. Otherwise, the FST will stop you. For example, if you have a transfer form with joint owners that need to sign, your other forms should only include the same two signers. Otherwise, personally identifiable information would be sent to the fund company when you send them your Evidence Summary.

- To delete a form you've added, click the x beside the form.



Form(s) selected

5149 Trusted Contact Person Consent	x
5149 Trusted Contact Person Consent (2)	x

3. Select account type **Individual** or **Non-individual**.

Tip! Client search is not currently available for non-individual accounts.

4. For:

- An individual account owner:
 - a. Find them by entering an appropriate **Account owner name(s)** using the **First name** and **Last name** field and click **Search**.

Tip! You can also click **Search** without entering a first name and last name and enter them on the next page.

- b. From the **Search for Client** dialog box, select the appropriate person and click **Retrieve Details**.

Search for Client ✕

🔒 To protect Client privacy, please do not screen share during the search.

First name Last name

	First name	Middle name	Last name	DOB	Trustee
	test		Estate	2007-02-04	No

[Cancel](#)

- c. If you can't find their information, **Cancel** and type their information manually.
- A non-individual account owner, type in their name.
5. Click **Next**.

Tip! The **Cancel** button deletes the record and closes this session.

Review/enter owner details

1. Review the owner details and update any fields as needed.

Tips!

- Any changes to owner details will only apply to this session. Follow existing processes to make any permanent updates.
- If you entered a **non-individual owner**, you don't need to enter anything on this page.

2. Click **Next**.

eSignature form selection

Account owner name(s)
test Estate x

First name
test x

Middle name
Non-Individual's name not allowed

Last name
Estate x

Date of Birth
2007-02-04 x

Address
123 King St. x

City
Waterloo x

Province
ON v

Postal Code
N2J 4C5 x

Preferred Phone
+1 519-555-5555 x

Mobile Phone
+1 XXX-XXX-XXXX

Email Address
sunlife@sunlife.com x

Changes made to the Client details presented above will not be updated in any other tools. Please follow your existing processes for updating Client details.

Cancel Previous Next

Form(s) and signer details

This page lists the forms that you've selected previously. Each form has its own twistie that should be open and filled out.

From this page, you can:

- **Delete** a form you've previously entered using the **trash can**.
- **Add** forms by selecting **Add Form (maximum of 5 forms)** and selecting the same instructions as on the previous page.
- **Start over** by clicking the **Start over** button.

Tip! The **Start over button** saves the current package as a draft and takes you make to the first page where you can start a new package. If you are an advisor staff and prepare eSign packages for them, this is a great feature!

To continue completing the saved package, go to **Signature centre** and open the appropriate package or delete it.

Under each twistie, you'll enter an **account/contract/policy number** and **select a signer** for each of the forms selected.

1. Open the first twistie.
2. In the **Account/Contract/Policy number** field, enter the policy number following the format xxxxxx-x. For example, 1234567-8.

Tip! If you do not have a policy number for Payout annuity, Superflex or Sun GIC Max applications leave the field blank.

3. In the **Role** drop-down list, select the option for the individual(s) signing the form.
4. In the **First name** and **Last name** fields, enter the name of the signer.

Tips!

- If you need to add signers, select **Add another**.
- If you have more than one signer and want to delete one, click **Remove** beside the appropriate signer.

Signer details (minimum 1 required)

Role	First name	Last name	
Owner	test	Estate	Clear
Select	Non-Individual's name not allowed	Non-Individual's name not allowed	Remove

+ Add another
Delete form
Reset form
Launch form

5. Click **Launch form**.

Complete the forms

The form launches and you must complete it.

1. Confirm the signer data added in the previous steps.
2. Type the applicable information into the fields on the form.

Tips!

- The form will not indicate the required fields when it opens. However, if a required field is missed and you select **Submit**, the required fields will be highlighted. You can select **Submit** before you enter the information. This will allow you to see all the required fields.
- If you are not done completing the form and want to come back to it later, click **Save as Draft**. The form(s) and signer details page appears again, and a draft icon appears beside the form you've saved as draft. To reopen the form and continue, open the twistie and click **Launch form**.

eSignature form selection

Form(s) and signer details

0 of 3 form(s) complete.

> 5149 Trusted Contact Person Consent		
> 5149 Trusted Contact Person Consent (2)		
> 4428 Non-registered Transfer		
> Add Form (maximum of 5 forms)		

Cancel Start over Next

3. Double-check the form is complete prior to submitting. Click **Submit**.
4. Repeat the steps to fill out the roles, names and form for each form.

5. When all forms are completed, click **Next**.

eSignature form selection

Form(s) and signer details

3 of 3 form(s) complete.

> 5149 Trusted Contact Person Consent	✓	🗑️
> 5149 Trusted Contact Person Consent [2]	✓	🗑️
> 4428 Non-registered Transfer	✓	🗑️
> Add Form (maximum of 5 forms)		

Cancel Start over **Next**

Select Signing method

eSign is selected by default. Click **Next**.

Signing Method

Please select the signing method for this document package.

☒ eSign

☐ Print

Next

Verify signer details

On this page, you'll:

- select the eSignature type: **In-person** or **Remote**
- select the **delivery method** of fully signed packages
- have the option to **Add Supplementary** document
- have the option to **Request attachment** (for remote only)

Examples of Supplementary documents:

- Void cheque
- Relinquishing Institution
- Spousal Authorization/Consent

The next section covers the **In-person** process. If you want information on the **Remote** process, skip to that [section](#).

Verify signer details – In-person

1. From the **Client details** section:
 - a. Under **eSignature type**, select **In-person**.
 - b. Under **Delivery method for fully signed package**, select **Email and passcode** or **Email and security question** and enter/confirm the appropriate details.
 - c. If you want to add additional documents the eSignature package, under the appropriate form, click **Supplementary Documents**. The signer(s) will be presented these document(s) during their eSign session:
 - i. From the **Documents type** drop-down list, select the applicable option, and click **Upload**.
 - ii. In the new window, locate the required document, and click **OK**. You can only upload PDF or JPG files.
 - iii. If you need to add more documents, click **Add another** and follow steps i and ii above.
 - iv. Click **Continue**.

Supplementary documents
test Estate

Document type
Banking information documents ▼ Upload
Attach a void cheque or pre-authorized banking form.
Select ▼ Upload

Remove

+ Add another

Note: When adding large files (over 5 MB), it is recommended to add them one at a time to avoid extended wait times.

Cancel Continue

Tip! To remove a Supplementary document, click **Remove**.

- v. The **Supplementary documents** for each form are listed. You can also **delete** a request for the list.

255 Personal Info update (Owner)			
Add Supplementary documents		Request attachment	
Category	Document type	File name	Notes
Supplementary document	Banking information documents	Cheque.pdf	0.02MB

- i. Repeat steps i to v for each signer.

Tip! The **Advisor details** section only displays when the Advisor is required to sign the form.

1. If the advisor is required to sign the form, they must sign using **Remote eSignature**.
2. If the advisor is uploading document(s) to the eSignature package (only available if Advisor signature is required), click **Attachments** (the advisor will be asked to upload document(s) during the eSign session; after they have eSigned the form):
 - a. From the **Attachment type** drop-down list, select the applicable option. If selecting **Other documents**, in the textbox, enter the document type the Advisor is to upload during their eSign session.
 - b. If needed, click **Add another**, to request additional documents and follow step a above.
 - c. Click **Continue**.

d. Click **Send package**.

2. The **In-Person signature(s)** page confirms who's signature you need to collect. Click **Proceed**.

In-Person signature(s)

By selecting "Proceed", you are confirming the following client(s) are in person with you and are providing their electronic signature on the applicable documents.

test Estate

Mary Estate

Close

Proceed

3. Click the **name** of the person that's ready to sign, and click **Start**.

Select a recipient to begin signing.
Sélectionnez un destinataire pour commencer le processus de signature.

1. test Estate

Not started

Non commencé

Actions Required - Review & Sign | Actions requises - Vérifier et signer

2. Mary Estate

Not started

Non commencé

Actions Required - Review & Sign | Actions requises - Vérifier et signer

Start | Commencer

4. Ask the signer to read the page, and click **Accept** to confirm they've read and agree to the terms of the eSign Disclosure Document.

Read & accept this document 1 Page(s)

Consent to use electronic signatures
By clicking "Accept" you agree to the use of electronic signatures, and you agree that your electronic signature will have the same legal effect as your signature on a paper document.

Electronic Disclosures and Signatures Consent Page 1 of 1

I have read and agree to the terms of the eSign Disclosure Document. **Accept**

Tip!

If the person wants to decline to sign or wants to exit signing at this point, from the **More actions** drop-down, select the appropriate option.

100%

Read & accept this document 1 Page(s)

Consent to use electronic signatures
By clicking "Accept" you agree to the use of electronic signatures, and you agree that your electronic signature will have the same legal effect as your signature on a paper document.

Electronic Disclosures and Signatures Consent Page 1 of 1

I have read and agree to the terms of the eSign Disclosure Document. **Accept**

More Actions ▼

- Decline To Sign X
- Exit signing ↗

5. The **Review Document** page appears if you've added a **Supplementary document**. Ask the signer to review the document and click **Next**.

6. The first form appears. Ask the signer to review the document and click **Next**.

Signatures required Required Actions 0 of 1



Personal information change or correction



Do not use this for Corporate changes; submit Articles of Amendment and/or other appropriate documentation.

List the account/contract numbers for which you would like to make a change or correction:

Account/contract	Account/contract	Account/contract	Account/contract
1234567-8			

Complete the appropriate section(s) below. The client(s) must initial any corrections to the form.

☐ **Address** ☐ Permanent address change ☐ Temporary mailing address change (snowbird, student housing, etc.)

Note: The client's address can be updated through Update Client Profile, which is accessible through the Task Menu options in SV i-App. Retain this form in the client's file. For mutual fund accounts only: Submit a copy to Head Office.

From: (previous address)

Address (street number and name)		Apartment or suite
City	Province	Postal code

To: (new address)

Address (street number and name)		Apartment or suite
----------------------------------	--	--------------------

7. Ask the signer to click **Sign**.

Signatures required Required Actions 0 of 1



☐ other (please specify) _____ supporting documentation

Client authorization

Respecting your privacy

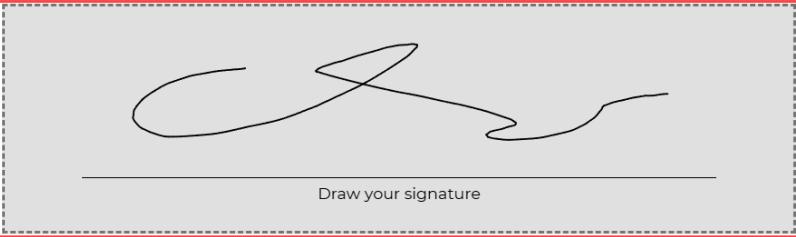
Our Purpose is to help our Clients achieve lifetime financial security and live healthier lives. We collect, use and disclose your personal information to: develop and deliver the right products and services; enhance your experience and manage our business operations; perform underwriting, administration and claims adjudication; protect against fraud, errors or misrepresentations; tell you about other products and services; and meet legal and security obligations. We collect it directly from you, when you use our products and services, and from other sources. We keep your information confidential and only as long as needed. People who may access it include our employees, distribution partners such as advisors, service providers, reinsurers, or anyone else you authorize. At times, unless we're prohibited, they may be outside your jurisdiction and your information may be subject to local laws. You can always ask for your information and to correct it if needed. In most cases, you have a right to withdraw your consent, but we may not be able to provide the requested product or service. Read our Global Privacy Statement and local policy at www.sunlife.ca/privacy or call us for a copy.

 Sign	Date (dd-mm-yyyy)
Adviser's first name Wintestw	Adviser's last name Dntest
Adviser's rep code 123456	

Return to:
Sun Life Financial Investment Services (Canada) Inc.
Sun Life Financial Distributors (Canada) Inc.
227 King St S
PO Box 1601 Stn Waterloo
Waterloo ON N2J 4C5

8. Under the **Capture signature**, ask the signer to use the mouse/ePen or their finger on the laptop's touchscreen to sign and click **Done**.

Capture Signature [] X



Draw your signature

[Clear](#) [Cancel](#) [Done](#)

9. Ask the signer to click **Confirm**.

Ready to confirm

☐ other (please specify) _____ supporting documentation

Client authorization

Respecting your privacy
Our Purpose is to help our Clients achieve lifetime financial security and live healthier lives. We collect, use and disclose your personal information to: develop and deliver the right products and services; enhance your experience and manage our business operations; perform underwriting, administration and claims adjudication; protect against fraud, errors or misrepresentations; tell you about other products and services; and meet legal and security obligations. We collect it directly from you, when you use our products and services, and from other sources. We keep your information confidential and only as long as needed. People who may access it include our employees, distribution partners such as advisors, service providers, reinsurers, or anyone else you authorize. At times, unless we're prohibited, they may be outside your jurisdiction and your information may be subject to local laws. You can always ask for your information and to correct it if needed. In most cases, you have a right to withdraw your consent, but we may not be able to provide the requested product or service. Read our Global Privacy Statement and local policy at www.sunlife.ca/privacy or call us for a copy.

Signature of owner
X  **Date (dd-mm-yyyy)**
30-07-2026 13:30 GMT

Advisor's first name Wntestv	Advisor's last name Dntest	Advisor's rep code 123456
--	--------------------------------------	-------------------------------------

Return to:
Sun Life Financial Investment Services (Canada) Inc.
Sun Life Financial Distributors (Canada) Inc.

Please confirm to complete signing.

Confirm

10. Repeat these steps for each document/form displayed.

Tip! The signer will only have to capture their signature once. The others times, they'll just click **Sign** and their signature will automatically be added.

11. When the **Thank You** page appears, click **Done**.

Thank You, test Estate

You have completed signing your documents.
Please pass the controls back to the host of this transaction.

Done

12. Repeat steps 3 to 11 above for each signer.
13. The Signature Centre dashboard will open to display the package(s). The signers receive an email from Sun Life where they can **review and download the signed documents**.

Tip! For instructions on how the signer can review and download the signed documents, see the information in the Sun eApp training roadmap as the information is the same. Click [here](#) for the detailed experience and scroll to the **In-Person** or **Remote** sections.

The signer receives one email instead of multiple. Based on the category you've selected for the package, **Market-based investments**, **Individual Insurance** or **Guaranteed Investments** will be included in the title of the email instead of the form name.

14. Go to the [Signature centre](#) section.

Verify signer details – Remote

1. From the **Client details** section:
 - a. Leave the **eSignature type** default option selected: **Remote**.
 - b. Enter the signer's **Email Address** and **Mobile number**.
 - c. If you want to add additional documents the eSignature package, under the appropriate form, click **Supplementary Documents**. The signer will be presented these document(s) during their eSign session:
 - i. From the **Documents type** drop-down list, select the applicable option, and click **Upload**.
 - ii. In the new window, locate the required document, and click **OK**. You can only upload PDF or JPG files.
 - iii. If you need to add more documents, click **Add another** and follow steps i and ii above.
 - iv. Click **Continue**.

Supplementary documents

test Estate

255 Personal info update (Owner)

Document type

Banking information documents

Upload

Attach a void cheque or pre-authorized banking form.

Select

Upload

Remove

Add another

Note: When adding large files (over 5 MB), it is recommended to add them one at a time to avoid extended wait times.

Cancel Continue

Tip! To remove a Supplementary document, click **Remove**.

- v. The **Supplementary documents** for each form are listed. You can also **delete** a request for the list.

255 Personal info update (Owner)			
Add Supplementary documents		Request attachment	
Category	Document type	File name	Notes
Supplementary document	Banking information documents	Cheque.pdf	0.02MB

- d. If you are **requesting documents from the signer**, under the appropriate form, click **Request attachment**. The signer(s) will be asked to upload document(s) during their eSign session after they have eSigned the form:

- i. From the **Attachment type** drop-down list, select the applicable option. If selecting **Other documents**, in the text box, enter the document type the signer is to upload during their eSign session.
- ii. If you need to request other documents, click **Add another** and follow steps i above.

Tip! To an attachment request, click **Remove**.

- iii. Click **Continue**.

- iv. The **Requested attachment** requested for each form are listed along with the Supplementary documents. You can also **delete** a request for the list.

255 Personal info update (Owner)			
Add Supplementary documents		Request attachment	
Category	Document type	File name	Notes
Supplementary document	Banking information documents	Cheque.pdf	0.02MB
Request attachment	Banking information documents	-	Attach a void cheque or pre-authorized banking form. (Formid: 52606ec2-c400-40ba-9171-c6ee875168b0)

Tip! The **Advisor details** section only displays when the Advisor is required to sign the form.

- If the advisor is required to sign the form, they must sign using **Remote** eSignature.
- If the advisor is uploading document(s) to the eSignature package (only available if Advisor signature is required), click **Attachments** (the advisor will be asked to upload document(s) during the eSign session after they have eSigned the form):
 - a. From the **Attachment type** drop-down list, select the applicable option. If selecting **Other documents**, in the textbox, enter the document type the Advisor is to upload during their eSign session.
 - b. If needed, click **Add another**, to request additional documents and follow step a above.
 - c. Click **Continue**.

- e. Click **Send package**. An email will automatically be sent to the signer(s) letting them know documents are awaiting their signature. The Signature Centre dashboard will open to display **All packages**.

Tip! The **Signer's eSignature experience** is the same as the one for Sun eApp. They will receive one email instead of multiple. Based on the category you've selected for the package, **Market-based investments**, **Individual Insurance** or **Guaranteed Investments** will be included in the title of the email instead of the form name. Click [here](#) for the detailed experience and scroll to the **In-Person** or **Remote** sections.

If you've added **Supplementary documents**, they will be displayed before the signer signs the form. If the documents are incorrect, the signer shouldn't sign.

Signature centre

The Signature Centre dashboard is a tool that allows you to view and manage the electronic signature package and view status of documents and attachments (if requested) that have been submitted via the various eSignature tools.

For this user guide, below you'll find a few things you should know:

Completing a package when you've requested attachments package

For remote signing, if you've requested attachments, once the signature(s) are completed, you must review the document attached by the signer. This is required to ensure the attachments are correct and is needed to complete the package, so it doesn't expire.

1. From Signature centre, go to the **Details** page of the package and click **Review attachments**.

The screenshot shows the 'Signature Centre' dashboard. At the top, there's a yellow header with the text 'Signature Centre'. Below the header, there's a 'Back' button and two links: 'Download attachments' and 'View/print'. The main content area shows 'Advisor of record: Wntestw Dntest' and 'Details'. There's a table with package information:

Package Name	Number(s)	Expiry date	Package status
Market-based investments		17 Aug 2026	In progress
5149 Trusted Contact Person Consent	9876543-2		
5149 Trusted Contact Person Consent (2)	1324567-8		
4428 Non-registered Transfer	1324567-8		

Below this table is a table with columns: Name, Form(s), Authentication method, Email address, Signing status, and Actions.

Name	Form(s)	Authentication method	Email address	Signing status	Actions
test estate	5149 Trusted Contact Person Consent 4428 Non-registered Transfer	Security question	ann.bergeron@sunlife.com	Signed (In-person)	Resend email
Mary estate	5149 Trusted Contact Person Consent (2) 4428 Non-registered Transfer	226-808-3282	ann.bergeron@rogers.com	Signed	Resend email

At the bottom, there are four buttons: 'eSign', 'Cancel Package', 'Review attachments' (highlighted with a red box), and 'Complete package'.

2. A new window opens. Click **View** to view what the signer attached.

Package attachments

MARY ESTATE (5149 TRUSTED CONTACT PERSON CONSENT (2)4428 NON-REGISTERED TRANSFER)

Banking information documents

Attach a void cheque or pre-authorized banking form. (FormId: efbee820-963d-47de-ad41-bdde1bb84e55)

View

Cancel

Continue

3. The attachment downloads. After verifying the correct document was attached, click **Continue**.

Package attachments

MARY ESTATE (5149 TRUSTED CONTACT PERSON CONSENT (2)4428 NON-REGISTERED TRANSFER)

Banking information documents

Attach a void cheque or pre-authorized banking form. (FormId: efbee820-963d-47de-ad41-bdde1bb84e55)

Validated

Cancel

Continue

4. The **Details** page reappears. Click **Complete package**.

Signature Centre

Back

Download attachments | View/print

Advisor of record: Wntestw Dntest

Details ☐ Actioned

Package Name	Number(s)	Expiry date	Package status
Market-based investments 5149 Trusted Contact Person Consent 5149 Trusted Contact Person Consent (2) 4428 Non-registered Transfer	9876543-2 1324567-8 1324567-8	17 Aug 2026	In progress

Name	Form(s)	Authentication method	Email address	Signing status	Actions
test estate	5149 Trusted Contact Person Consent 4428 Non-registered Transfer	Security question	ann.bergeron@sunlife.com	Signed (In-person)	Resend email
Mary estate	5149 Trusted Contact Person Consent (2) 4428 Non-registered Transfer	226-808-3282	ann.bergeron@rogers.com	Signed	Resend email

eSign

Cancel Package

Review attachments

Complete package

- From this page, you can **Download attachments** or **View/print the forms/documents** to view the details of the package including which **forms** were signed, which **numbers**, the **expiry date** and the package **status**.

[Back](#)
[Download attachments](#) | [View/print](#)

Advisor of record: Wntestw Dntest

Details ☐ Actioned ⓘ

Package Name	Number(s)	Expiry date	Package status
Market-based investments		17 Aug 2026	Completed
5149 Trusted Contact Person Consent	9876543-2		
5149 Trusted Contact Person Consent (2)	1324567-8		
4428 Non-registered Transfer	1324567-8		

Name	Form(s)	Authentication method	Email address	Signing status	Actions
test estate	5149 Trusted Contact Person Consent 4428 Non-registered Transfer	Security question	ann.bergeron@sunlife.com	Signed (In-person)	Resend email
Mary estate	5149 Trusted Contact Person Consent (2) 4428 Non-registered Transfer	226-808-3282	ann.bergeron@rogers.com	Signed	Resend email

[eSign](#)
[Cancel Package](#)
[Review attachments](#)
[Complete package](#)

- To go back to all your eSign packages, click **Back**.

[Back](#)
[Download attachments](#) | [View/print](#)

Advisor of record: Wntestw Dntest

Details ☐ Actioned ⓘ

Package Name	Number(s)	Expiry date	Package status
Market-based investments		17 Aug 2026	Completed
5149 Trusted Contact Person Consent	9876543-2		
5149 Trusted Contact Person Consent (2)	1324567-8		
4428 Non-registered Transfer	1324567-8		

Name	Form(s)	Authentication method	Email address	Signing status	Actions
test estate	5149 Trusted Contact Person Consent 4428 Non-registered Transfer	Security question	ann.bergeron@sunlife.com	Signed (In-person)	Resend email
Mary estate	5149 Trusted Contact Person Consent (2) 4428 Non-registered Transfer	226-808-3282	ann.bergeron@rogers.com	Signed	Resend email

[eSign](#)
[Cancel Package](#)
[Review attachments](#)
[Complete package](#)

Retrieve a draft package

If you've **saved** a package or clicked **Start over**, the package is saved in Signature centre. To retrieve it:

- From Signature centre, select the appropriate package.

Tip! To easily find your package, use the **Search by name or number** field to Search by Client name or account/contract/policy number.

Sun Life

Signature Centre

Advisor of record: Wntestw Dntest

search by name or number

All packages	221	In progress	1	Completed	77	Cancelled	1	Expired	20
Locked out	0	Expiring soon	1	Opted out	0	Declined	2	Drafted	119

Name	Package Name	Number(s)	Date Sent	Expiry date	Package status
test Estate	Market-based investments (2 Forms)	2345678-9	27 Jul 2026	11 Aug 2026	Drafted

Discard

2. From the **Form(s) and signer details** page, continue to fill out the forms as outlined in the [previous section](#).

Tip! When you include one form only in a package, you are taken directly to the form where you can continue to fill it out.

Where can I get help?

- Multi-form package demo video <coming soon>
- For questions or issues, reach out to the Advisor Experience Team:
1-800-800-4SUN (4786) Press 1-3-3 or email: advisorsexperienceteam@sunlife.com