Applying with the Product bundling feature

This document covers the steps required in Sun eApp to apply for the 2025 Term and CII Special offer available until December 31, 2025.

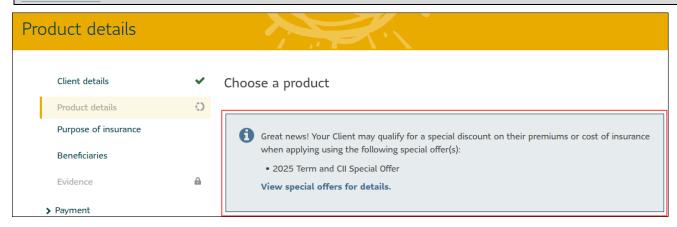
Step 1 – Start a new business application and enter Client details

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.

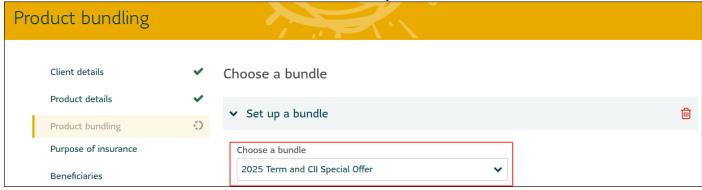
Tip! To quickly and easily view any of current Special offers available, click <u>View special offers</u> for details.



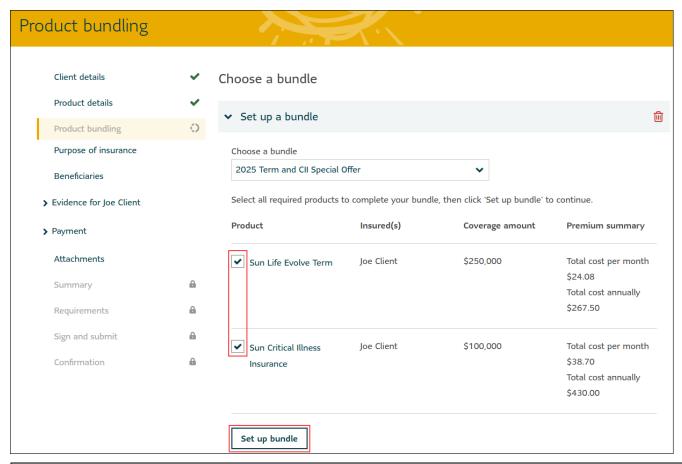
Enter the Sun Life Evolve Term and Sun Critical Illness Insurance product information as usual, either manually or by prefilling from an illustration.

Step 3 – Fill out the Product bundling page

1. Under Choose a bundle, select 2025 Term and CII Special Offer.



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



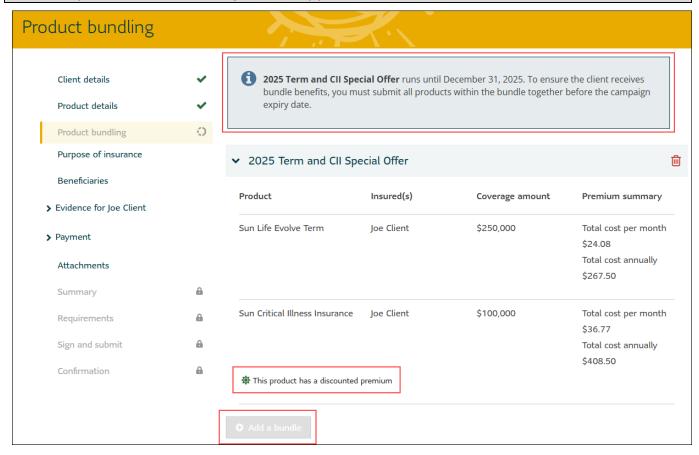
Reminder! Bundle discounts apply to **1 product per bundle**. If the Client applies for 5 CII and 1 Term, only one CII policy would be in the bundle, and get the discount.

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.

Tips!

- 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.
- If you've prefilled the product information from Sun Life Illustrations (SLI), the premium displayed in Sun eApp and in SLI will not match as we are in the process of updating SLI. You may use the 2025 Term and CII Special Offer Excel tool to see the premium before filling out the application.

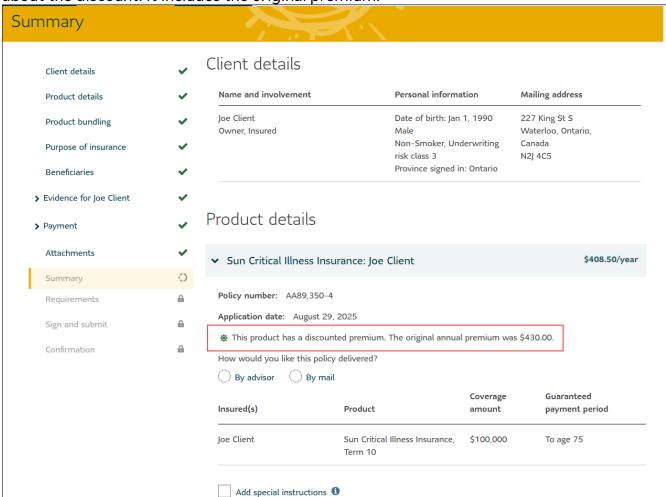


Step 4 – Continue the application

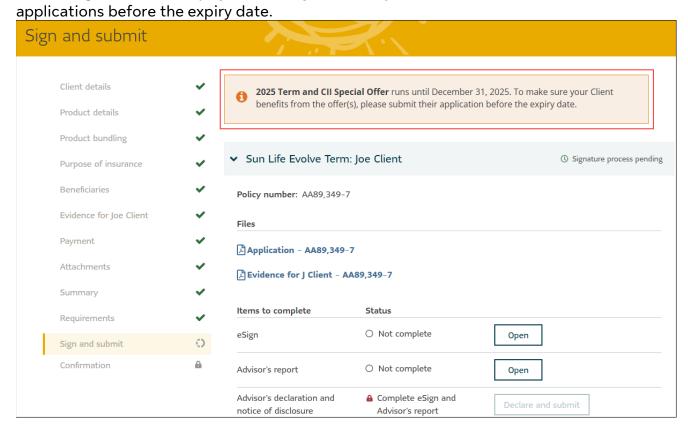
Complete the application as usual until you reach the **Summary** page.

Step 5 – View additional messages

• On the **Summary** page, under the **Sun Critical Illness Insurance** section, you see a message about the discount. It includes the original premium.



• On the **Sign and Submit** page, a message reminds you to make sure to submit their



Step 6 – Complete and submit the applications

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