

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 [View special offers 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**.

Product bundling

Client details ✓

Product details ✓

Product bundling

Purpose of insurance

Beneficiaries

> Evidence for Joe Client

> Payment

Attachments

Summary

Requirements

Sign and submit

Confirmation

Choose a bundle

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

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.

Product bundling

Client details ✓

Product details ✓

Product bundling ↻

Purpose of insurance

Beneficiaries

➤ Evidence for Joe Client

➤ Payment

Attachments

Summary 🔒

Requirements 🔒

Sign and submit 🔒

Confirmation 🔒

2025 Term and CII Special Offer runs until December 31, 2025. 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.

- ## Sign and submit

- [Client details](#)
 - [Product details](#)
 - [Product bundling](#)
 - [Purpose of insurance](#)
 - [Beneficiaries](#)
 - [Evidence for Joe Client](#)
 - [Payment](#)
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 - [Summary](#)
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 - Sign and submit**
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2025 Term and CII Special Offer runs until December 31, 2025. To make sure your Client benefits from the offer(s), please submit their application before the expiry date.

☰ Sun Life Evolve Term: Joe Client 🕒 Signature process pending

Policy number: AA89,349-7

Files

📎 Application - AA89,349-7

📎 Evidence for J Client - AA89,349-7

Items to complete	Status	
eSign	<input type="radio"/> Not complete	<button>Open</button>
Advisor's report	<input type="radio"/> Not complete	<button>Open</button>
Advisor's declaration and notice of disclosure	<input checked="" type="checkbox"/> Complete eSign and Advisor's report	<button>Declare and submit</button>

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