

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 February 27, 2026.

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 pre-filled 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 🔒

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 **Sun Critical Illness Insurance** 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	✓	Product details		
Attachments	✓	▼ Sun Critical Illness Insurance: Joe Client \$408.50/year		
Summary	↻	Policy number: AA89,350-4		
Requirements	🔒	Application date: August 29, 2025		
Sign and submit	🔒	⚙️ This product has a discounted premium. The original annual premium was \$430.00.		
Confirmation	🔒	How would you like this policy delivered?		
		<input type="radio"/> By advisor <input type="radio"/> By mail		
		Insured(s)	Product	Coverage amount Guaranteed payment period
		Joe Client	Sun Critical Illness Insurance, Term 10	\$100,000 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 #ccc; 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: #f0f0f0; 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: center;">Open</td> </tr> <tr> <td>Advisor's report</td> <td><input type="radio"/> Not complete</td> <td style="text-align: center;">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: center;">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
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											
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.