

Last updated: May 3, 2024

'Sun Life 1-Year Bridge Term Insurance' Client journey and messaging

The touchpoints in the Client engagement journey are non-contractual offerings. Sun Life reserves the right to terminate, suspend or modify the elements of the Client engagement journey at any time and without notice. Please note that the samples of the Client-facing messaging within this document is subject to change and are provided as examples only.



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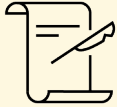
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Our industry-first term insurance solution is supported by a robust Client engagement plan



Drive best outcome for Clients

Help Clients understand the specifics about their life insurance product and guide them to take right actions at the right time through ongoing prompts



Keep more Clients for your business

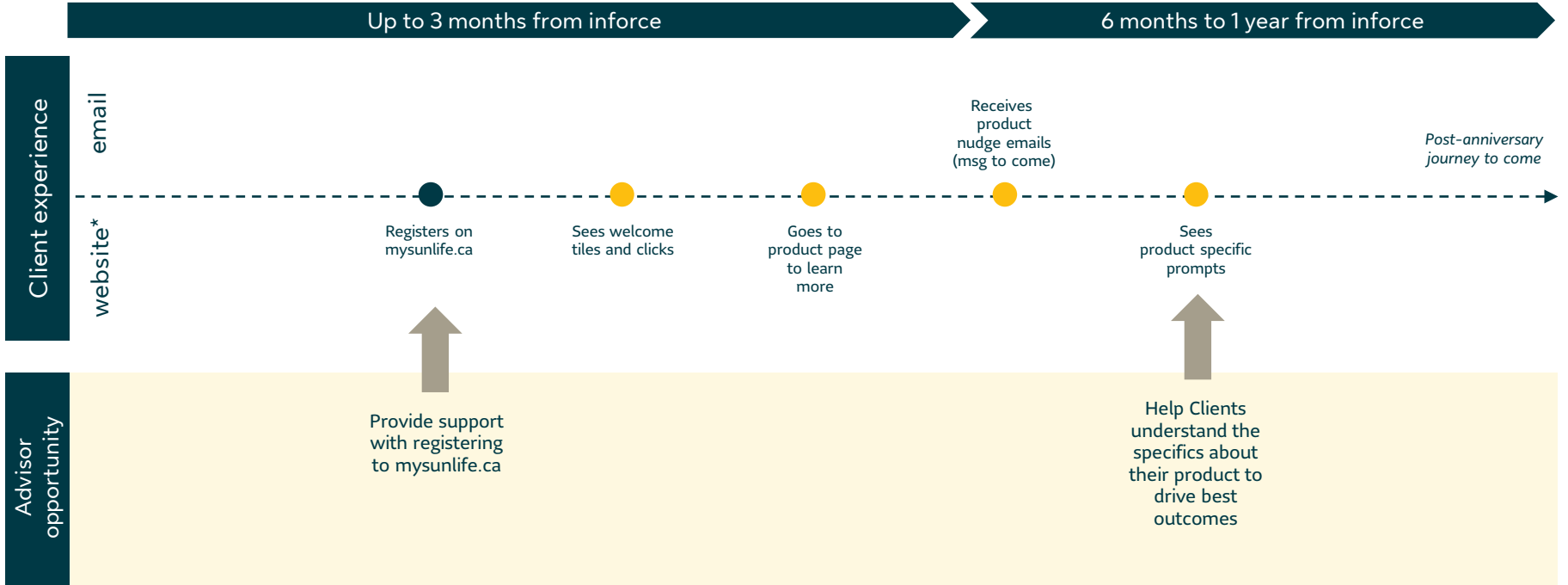
Clients will be reminded that they can re-apply for life insurance when they have outstanding requirements, so you can keep more Clients.



Help Clients live healthier lives

For Clients living with diabetes, Sun Life will provide practical health resources and share useful information vetted by healthcare professionals

Sun Life will reach out to Clients at key moments on your behalf, providing you with opportunities to offer support and enhance relationships





Welcome tiles on mysunlife.ca* for 1-Year Bridge Term Clients (from policy inforce)

Interstitial tile (displayed for one month from policy inforce)

Hi %DISPLAY_FIRST_NAME%

You did it! You're covered with Sun Life 1-Year Bridge Term Insurance.
Keep that good feeling going.

[Show me how](#) [No, thanks.](#)

Mobile yellow card (displayed until their policy anniversary)

[Dismiss](#)

Your loved ones are protected.
Here's how you can keep it that way.

[Show me how](#)

Contextual tile (displayed until their policy anniversary)

%DISPLAY_FIRST_NAME%, 1 year goes by fast. Stay protected by applying for another term policy whenever you're ready.

[Show me how](#)

* Log-in to mysunlife.ca is required



1-Year Bridge Term page on mysunlife.ca*



Security while you wait for outstanding medical tests

Take comfort knowing you have coverage in place until with Sun Life 1-Year Bridge Term Insurance.

Re-apply whenever you're ready

Apply for more coverage or a longer term at anytime once you have your outstanding medical requirements and any necessary follow ups.

[I'm ready to re-apply](#)

Looking for support on managing diabetes?

You have access to our Diabetes Care Program through Lumino Health™ Pharmacy (LHP), with services provided by Pillway. Check now.

Frequently asked questions

This section is only available
for Clients outside of QC

Can I increase or decrease the face amount? 🗨️

No increases are allowed for 1-year Bridge Term policies. Decreases are allowed, you can talk to your advisor for more details

What happens to my policy after my term ends? 🗨️

Your 1-year Bridge Term policy cannot be renewed at the end of the initial term and cannot be converted to permanent insurance.

Is there a time limit for me to re-apply for life insurance? 🗨️

You can re-apply for life insurance once you've completed the outstanding medical requirements and any necessary follow ups. Your 1-Year Bridge Term policy will automatically end after one year.

When could I reapply for life insurance? 🗨️

Once you've completed your outstanding requirements, you could reach out to your advisor regarding reapplication.

What if I buy another life insurance policy before my 1-Year Bridge Term policy expires? 🗨️

You could cancel your 1-year Bridge Term policy before it expires.

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Address

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* This advisor is an independent representative who sells products issued by Sun Life Assurance Company of Canada as well as products issued by other insurance and financial services companies.

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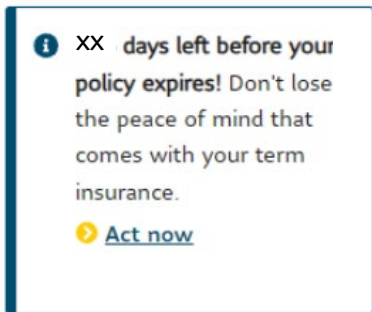
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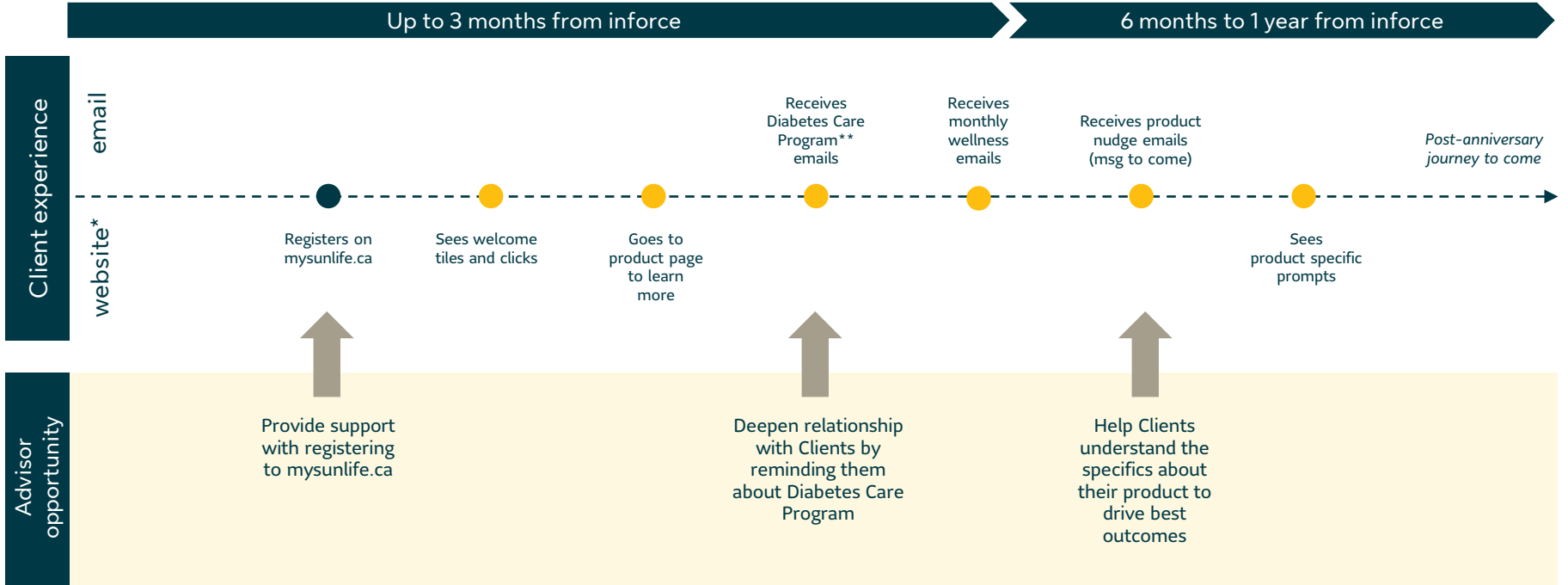
Prompts on mysunlife.ca* for 1-Year Bridge Term Clients

Active alert tile (displayed in month 11 from inforce)



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Sun Life will reach out to Clients at key moments on your behalf, providing you with opportunities to offer support and enhance relationships



● Existing ● New

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** Diabetes Care Program is not available in QC.



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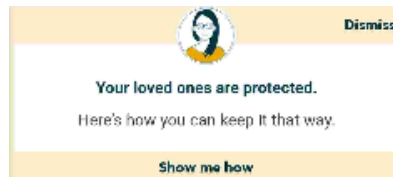
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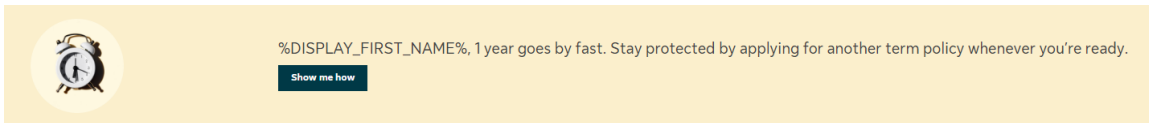


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Diabetes Care Program onboarding email (3 days after policy enforce date)



Can't see this email? [View online](#)



Managing your health, made easier.

Hi <%=name%>.

Managing your health can sometimes cause financial, physical or mental health challenges. That's why Sun Life Clients have access to our Diabetes Care Program¹ through Lumino Health™ Pharmacy (LHP), with services provided by Pillivay.² This program can help you feel in control and motivated to stay healthy. This way, you can spend quality time with family and friends, feeling your best.

What you get from the program

Welcome offer¹ Get real-time glucose readings to your smartphone with a FreeStyle Libre 2 trial kit after your pharmacy team consultation.	Fast, free delivery Skip the long lines and wait times and get your prescription medications and supplies delivered to your door.	Access to diabetes management coaching Get 1 year of personalized guidance from a diabetes health-care professional.	Preferred pricing¹ Get preferred pricing on FreeStyle Libre 2 sensors.
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How can coaching help me?

Connecting with a specialized diabetes health-care professional can empower you to reach your health goals at your own pace. They'll work with you to develop a personalized action plan to help address your health needs through lifestyle strategies.

Ready to enjoy these great benefits?

Here's how to sign up:

1. Click [Sign up for LHP](#) now below and [Create an account](#)
2. Sign up using your Sun Life ID and enter your exclusive referral code: [SL12345](#)

[Sign up for LHP now](#)

Already registered for LHP? Just call 1-877-LUMINO1 to activate your referral code.

Your referral code expires **#date#**



Can't see this email? [View online](#)



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What you get from the program

Fast, free delivery Skip the long lines and wait times and get your prescription medications and supplies delivered to your door.	Access to diabetes management coaching Get 1 year of personalized guidance from a diabetes health-care professional.	Preferred pricing¹ Get preferred pricing on FreeStyle Libre 2 sensors.
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[Sign up for LHP now](#)

Already registered for LHP? Just call 1-877-LUMINO1 to activate your referral code.

Your referral code expires **#date#**

Left: Clients with Type 1, Type 2 diabetes

Right: Clients with pre-diabetes



Monthly wellness email



Can't see this email? [View online](#)



Summer never tasted so good

Hi <%=name%>,

Throwing a fun summer bash or having a quiet movie night? These 3 diabetes-friendly recipes are perfect for every occasion.

Why you'll love them

- Fresh and healthy
- Easy to customize
- Handpicked by a nutrition expert (Head Chef, Toronto Raptors)



Sweet potato hummus

[See recipe](#)



Basil-ginger turkey lettuce wraps with spicy slaw

[Make it now](#)



No-knife coconut-soy-pineapple chicken with brown rice noodles

[Get cookin'](#)

Let the tasty times begin!



Prompts on mysunlife.ca* for 1-Year Bridge Term Clients

Active alert tile (displayed in month 11 from inforce)

i XX days left before your policy expires! Don't lose the peace of mind that comes with your term insurance.

[Act now](#)

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Bridge Term offers more certainty
that a Client will keep their business with you.

We will take care of ongoing communication to help them
come back to you and re-apply for life insurance.

