

PREPARATION MATERIAL

Tele-interview

As part of your insurance application, you'll receive a call from Sun Life at the time of your choosing to complete a tele-interview.

What is the tele-interview?

Completing a tele-Interview is the most efficient way to collect relevant information needed to assess your application. We will ask a series of questions about your lifestyle, personal medical history and immediate family's medical history. We will ask questions that are personal in nature. The questions may include dates of diagnoses, treatment details and the status of any conditions. On average a tele-interview takes 25 minutes. The length of the interview varies depending on your history. We will verify your identity to ensure confidentiality and the call will be recorded.



Here's a quick checklist of what you need to prepare for the call:

Your family doctor

- Name
- Address
- Phone number
- Last visit

If you consulted a specialist, we might ask you for their contact information.

Parents and sibling medical history

- Medical history of your parents and siblings
- Age of diagnosis

Lifestyle questions

- Tobacco and alcohol use
- Driving record
- Travelling or living outside of Canada
- Participation in higher risk sports or activities for example: skydiving, motor vehicle racing, scuba diving

Medical information

- Diagnosis with dates
- Treatments with dates
- Dates of checkups and follow ups
- Name of medications
- Personal information, for example: height, weight

If the application is for a minor, please prepare the same information.

To help you follow along during the Tele-Interview, you can refer to this chart of medical conditions:

Blood

Anemia, hemophilia, bleeding disorder

Abnormal growths and malignancy

Cancer, leukemia, lymphoma, melanoma

Heart and circulatory

High blood pressure, high cholesterol, chest pain, stroke or heart attack

Mental health

Chronic anxiety, depression, schizophrenia, suicide attempt

Glands and / or endocrine system

Diabetes, abnormal blood sugar, thyroid disorders

Musculoskeletal

Arthritis, fibromyalgia, muscular dystrophy, paralysis, numbness or weakness of arm or leg

Gastrointestinal

Hepatitis, cirrhosis, Crohn's, irritable bowel syndrome, ulcerative colitis, rectal or intestinal bleeding

Skin

Dysplastic nevi, atypical moles

Immune system

Lupus, scleroderma, HIV, AIDS

Genitourinary

Breast lumps, abnormal pap smear, hysterectomy, prostatitis, kidney or bladder disorders, sugar or protein in urine

Respiratory system

Asthma, chronic obstructive pulmonary disease, sleep apnea, difficulty breathing or shortness of breath

Nervous system

Multiple sclerosis, dementia, developmental delay, epilepsy or seizure disorders, severe headaches or migraines, dizziness, fainting

Eyes, ears, nose, throat, mouth

Blindness/impaired vision, deafness/impaired hearing, glaucoma

What happens after your interview?

Sun Life uses this information to evaluate your eligibility for insurance. If necessary, we may contact you to schedule an appointment for tests or additional requirements.

Respecting your privacy:

Respecting your privacy is a priority for the Sun Life group of companies. We keep in confidence personal information about you and the products and services you have with us to provide you with investment, retirement and insurance products and services to help you meet your lifetime financial objectives. To meet these objectives, we collect, use and disclose your personal information for purposes that include: underwriting; administration; claims adjudication; protecting against fraud, errors or misrepresentations; meeting legal, regulatory or contractual requirements; and we may tell you about other related products and services that we believe meet your changing needs. The only people who have access to your personal information are our employees, distribution partners such as advisors, and third-party service providers, along with our reinsurers. We will also provide access to anyone else you authorize. Sometimes, unless we are otherwise prohibited, these people may be in countries outside Canada, so your personal information may be subject to the laws of those countries. You can ask for the information in our files about you and, if necessary, ask us in writing to correct it. To find out more about our privacy practices, visit www.sunlife.ca/privacy.

Questions or rescheduling?

If you have questions about the interview or need to reschedule, you can call us at **1-866-739-8863**.

Hours of operation, Eastern Time:

English	French
Monday to Friday 8:00 a.m. - 11:00 p.m.	Monday to Friday 8:00 a.m. - 8:00 p.m.
Saturday 10:00 a.m. - 6:00 p.m.	Saturday Closed
Sunday Closed	Sunday Closed



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