

PRE-UNDERWRITING SCREENING

Questions your advisor might ask you

As a first step your advisor will ask you some simple questions about your medical history and lifestyle. These questions help them understand your eligibility and can help you understand what to expect from your application process.



Here are some common questions you may be asked:

Medical questions

1. Do you currently take any medication or are you currently having any medical treatment?
 - If yes, has your medication or treatment changed recently?
2. Have you had treatment for, or experienced symptoms of, any of the following?
 - cancer, coronary heart disease, stroke, diabetes or sleep apnea
3. Do you have any symptoms or conditions that you have not had treatment and/or testing for yet?
4. What is the date you last saw a doctor?
 - What was the reason for the visit?
 - What was the outcome?
 - Do you need a follow-up?
5. Do you have any pending appointments with a general practitioner, specialist, or executive medical?

Lifestyle questions

1. Do you currently use drugs or have a history of drug or alcohol abuse?
2. Do you have a history of criminal activity, driving offences or a DUI?
3. Do you have any special licenses, such as a pilot's license (student, private, recreational or commercial)?
4. Did you travel outside of North America within the last year? Are you planning on doing so next year?
5. Do you take part in hazardous sports such as climbing, parachuting, heliskiing, scuba diving or any other hazardous activity?

When you complete the application, you'll answer some additional questions with your advisor, a third-party nurse and/or a tele-interviewer. Typically, the amount of insurance you're applying for will dictate who will speak with you and what they'll ask.

Questions?

We're here to help. If you have questions about the interview or the application process, you can:

call _____ at _____
any business day from _____ .

We help. You grow.

Sun Life Assurance Company of Canada is a member of the Sun Life group of companies.
© Sun Life Assurance Company of Canada, 2022. 810-5167-04-22

