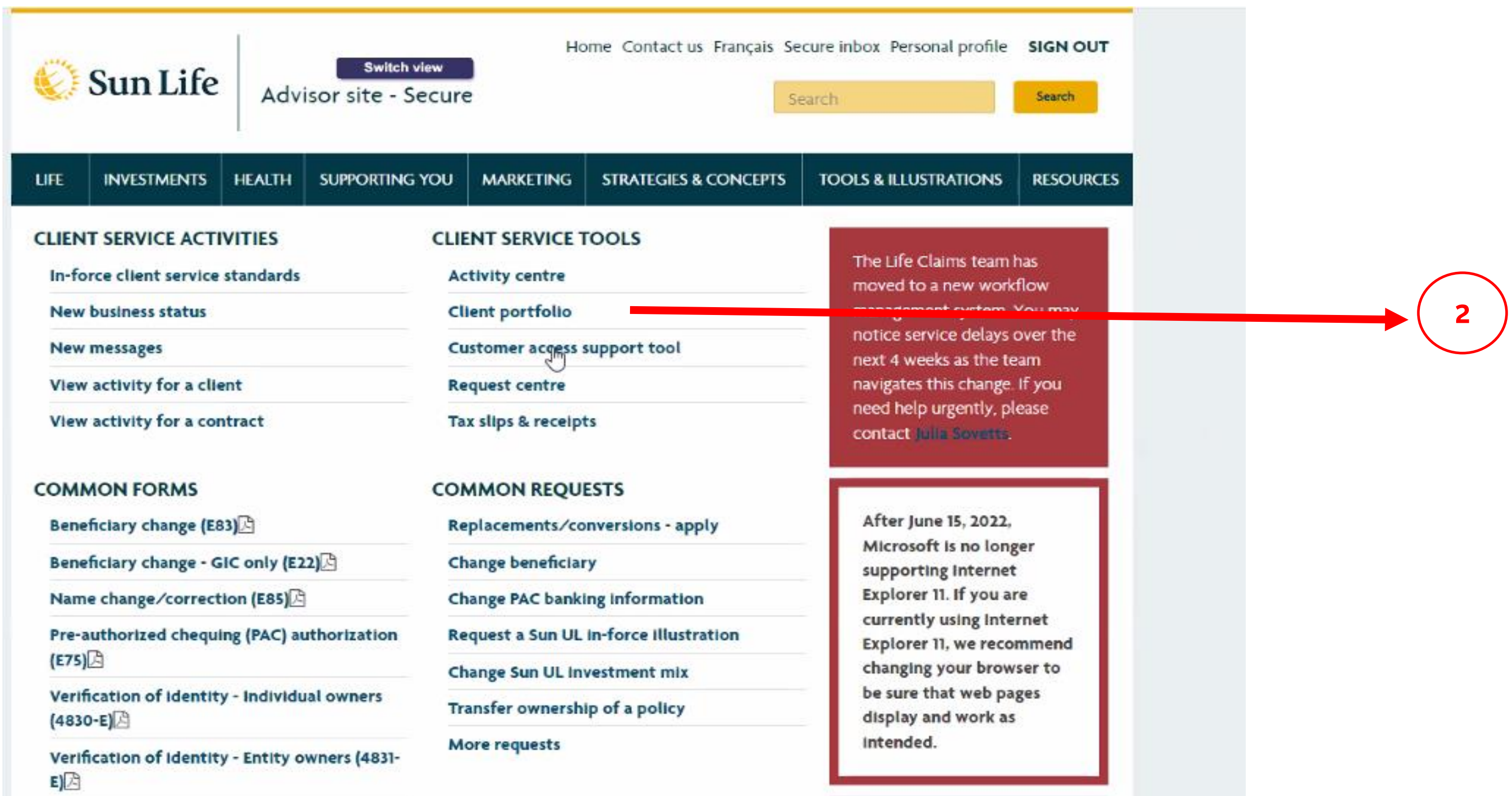
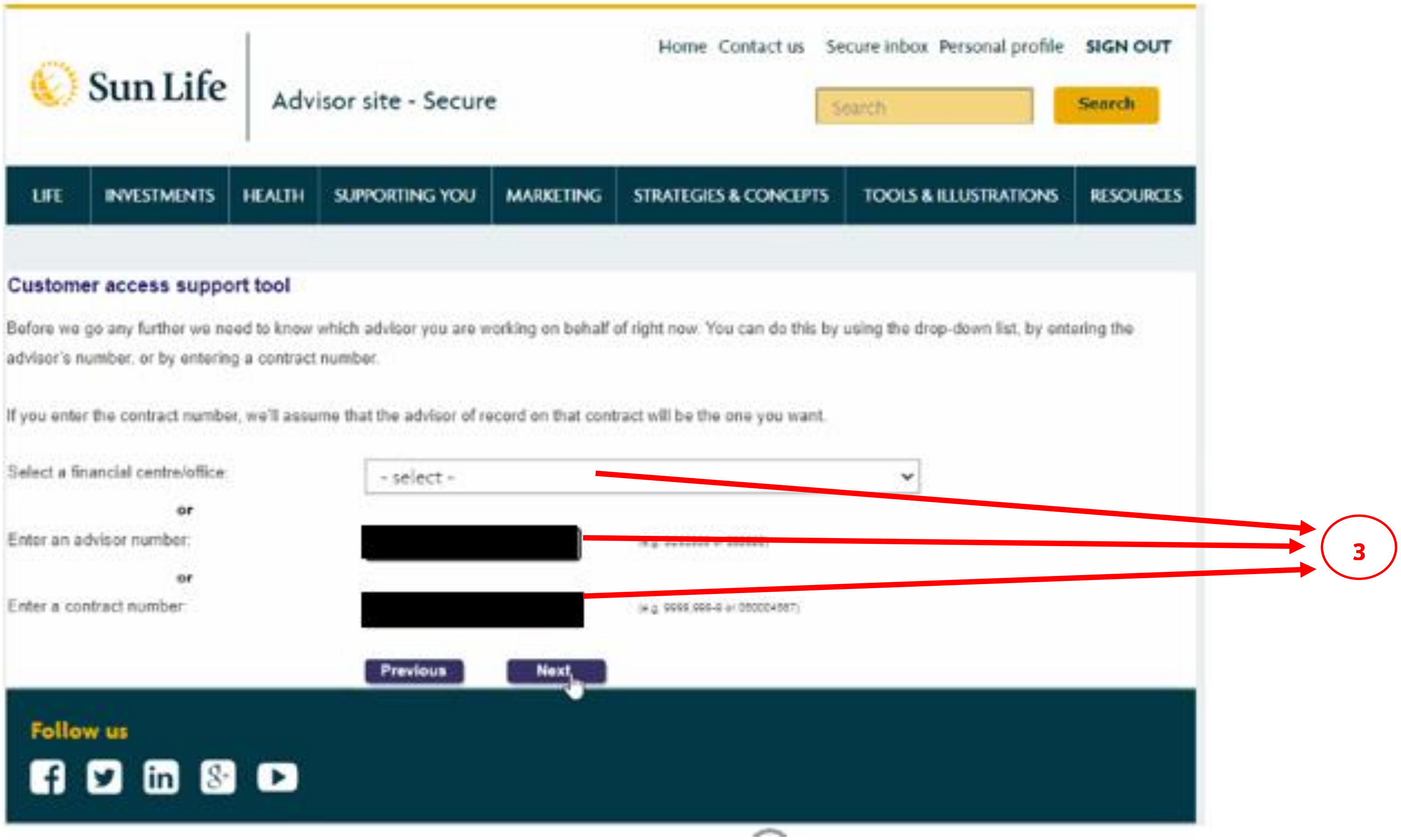
How to access statements online using the Customer Access Support Tool on Advisor Site

1. Login to advisor site (https://www.sunnet.sunlife.com/slfadvisor/signin/e/CommonSignin.aspx)

2. Select **Customer Access Support Tool** under "CLIENT SERVICE TOOLS"



3. Select FC, or enter advisor number or contract number of statement(s) to be retrieved



Tool displays search results

Advisor: [redacted]

Customer access support tool - Client search results

Please select the client you'd like or start a new search.

Pending Payout Annuities and Personal Health Insurance contract details are not viewable on this site, which means that clients who hold only these products won't be listed here.

Sort table by: Name Go

Name	Date of birth	
[redacted]	[redacted]	owner
[redacted]	[redacted]	insured

Results page: 1

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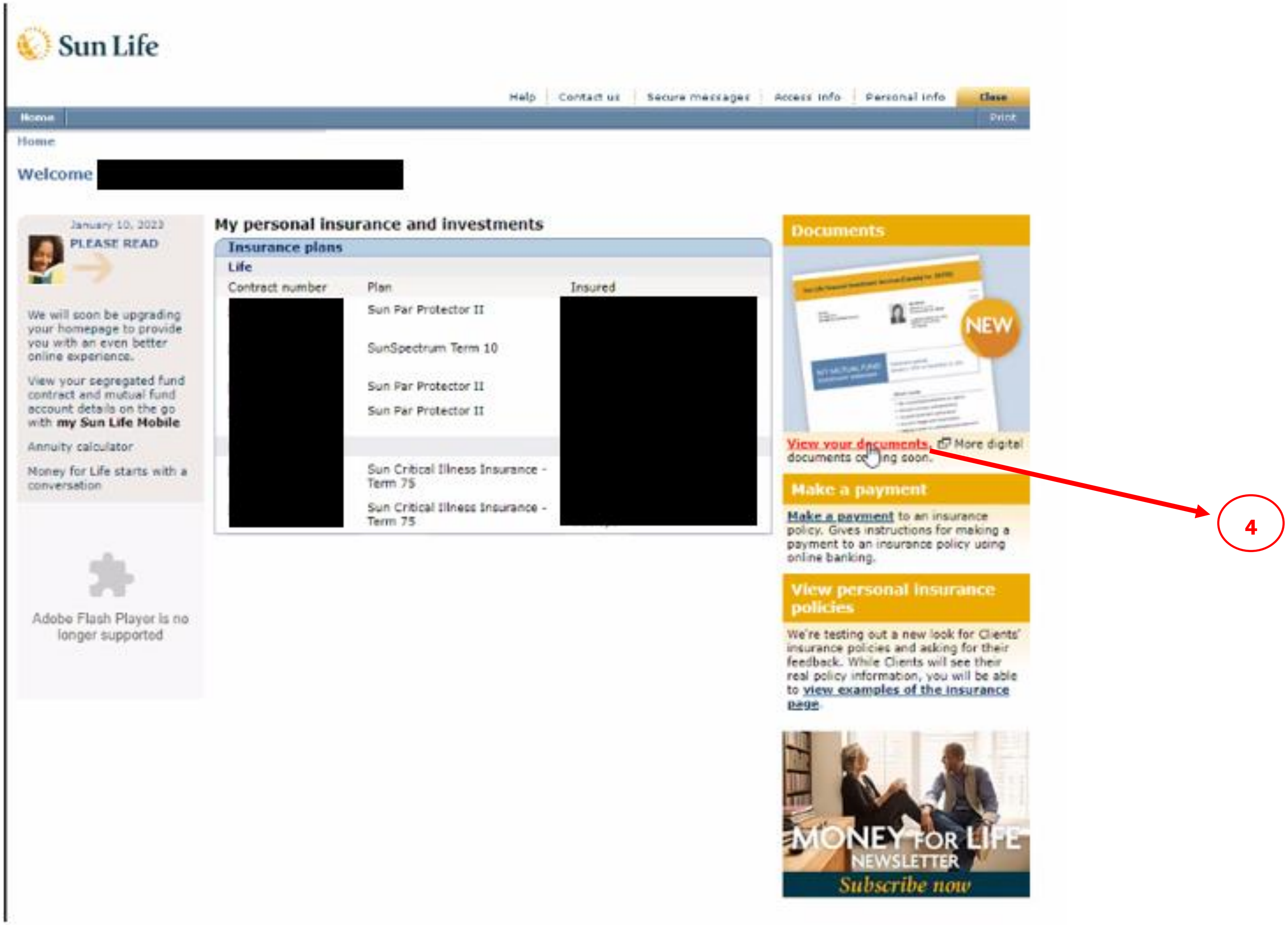
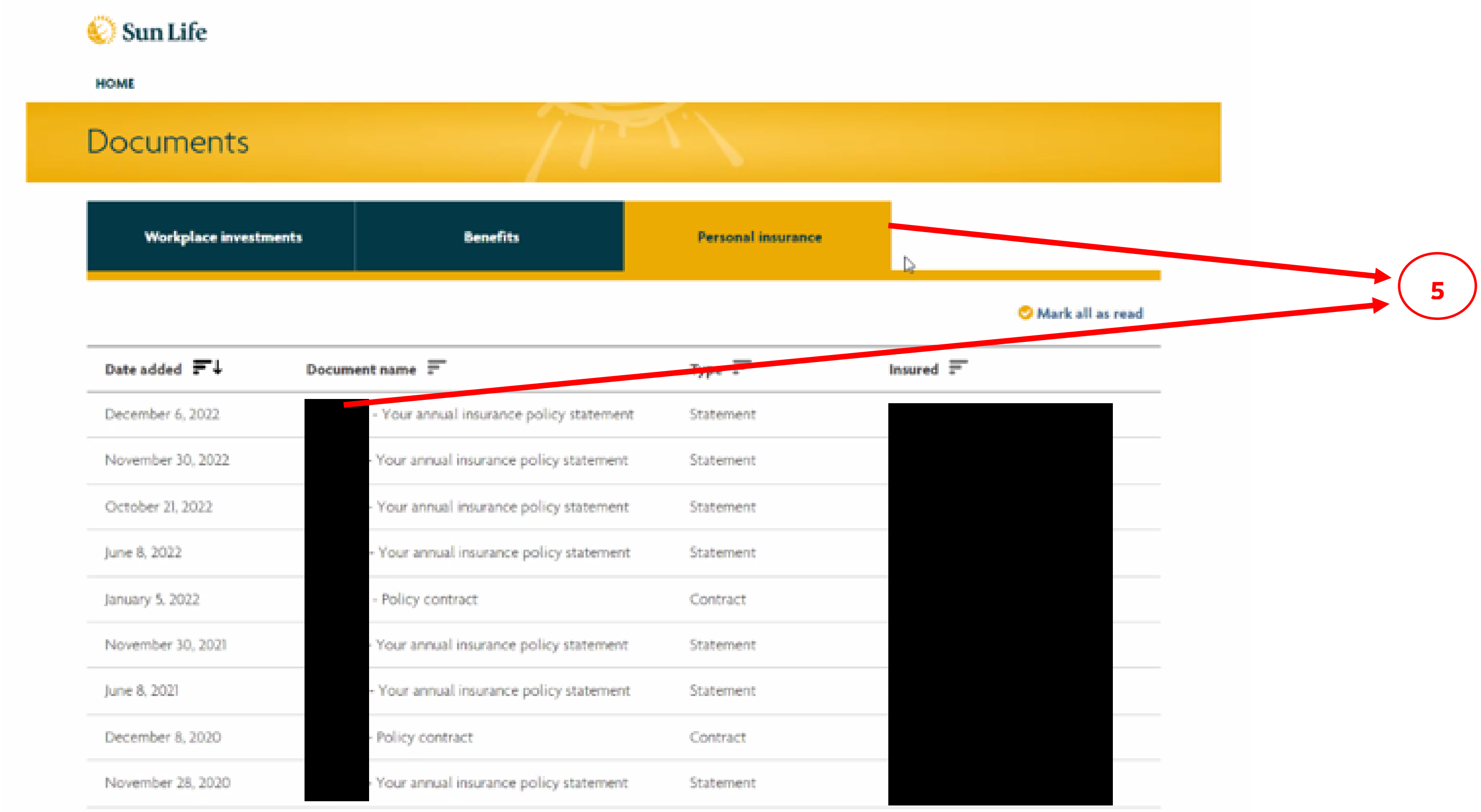
4. Click on **View your documents** to see all documents owned by the policyholder



5. Click on the **Personal Insurance** tab and select the policy number to view statement



SunUniversalLife

My insurance policy statement
Policy Number [redacted]

[redacted]

CONTACT INFORMATION

[redacted]

Or call our Customer Care Centre toll-free at 1 877 SUN-LIFE (1 877 786-5433).

My current coverage

Statement Period: August 9, 2019 to August 8, 2020

Who owns the policy?

[redacted]

Who is insured on the policy?	Type of coverage	Insurance amount(s)
[redacted]	Single Life Total Disability Benefit (Protection) to age 75	$200,000

Policy Summary

Policy Effective Date:
August 9, 2000

Death Benefit Option:
Insurance amount plus policy fund

Total Policy Death Benefit:
[redacted]

Beneficiary:
[redacted]

Planned Periodic Payment:
$3,000.00 Annually

Policy rate of return since policy effective date:
0.9%

As the **owner**, you can direct who we will pay the insurance benefits to on the death of the **insured person(s)**. You are responsible for all payments required to keep the policy in effect.

A **beneficiary** is who you choose (in writing) to receive the death benefit when the insured person(s) dies, while your policy is still in effect.

The **planned periodic payment** is the amount you chose to pay into the policy at set periods of time. While we fully guarantee the policy's cost of insurance rate, we don't guarantee your payment amount and there may be times when you have to make additional payments to keep your policy in effect. For example, if you have chosen indexed or managed accounts and interest earned is negative, additional payments may be needed.

Sun Life Financial