

Availability of Online Inforce Illustrations

Did you know that for some policies you are able generate inforce illustrations online through the Advisor Site?

This functionality allows you instant access to the information you need.

How do I know if I can use the online tool to generate an inforce illustration?

• Is it a participating (PAR) policy issued since 2010?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Do you need a Non-withdrawable premium fund (NWPF) illustration?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Are there paid-up additions (PUAs) on the policy, but the dividend option is not PUA?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Is the dividend option Loan Reduction?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Is the insurance policy Registered?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

If you answered 'No' to all of the questions, please go to the Sun Life Advisor site to generate the inforce illustration online.

If you answered 'Yes' to any of these questions, you will need to order an in-force illustration through the Request centre.

How to generate inforce illustrations online

Please log on to the Sun Life Advisor site and navigate to Client service tools -> Client portfolio

The screenshot shows the Sun Life Financial Advisor site interface. At the top left is the Sun Life Financial logo. To the right, there are links for 'Home', 'Contact us', and 'Français Se'. Below the logo is a 'Switch view' button and the text 'Advisor site - Secure'. A navigation bar contains the following categories: LIFE, INVESTMENTS, HEALTH, SUPPORTING YOU, MARKETING, and STRATEGIES & CONCEPTS. Below this bar, there are two columns of links. The left column is titled 'CLIENT SERVICE ACTIVITIES' and includes: In-force client service standards, New business status, New messages, View activity for a client, and View activity for a contract. The right column is titled 'CLIENT SERVICE TOOLS' and includes: Activity centre, Client portfolio (circled in red), Customer access support tool, Request centre, and Tax slips & receipts.

Enter the contract number and search for the policy.

Client Portfolio - Client / contract search

Please enter a contract number or your client's name. If you're not sure how to spell their name, enter as many characters as you can.

Contract number:

9999,999-9

(e.g. 9999,999-9 or 050004567)

or

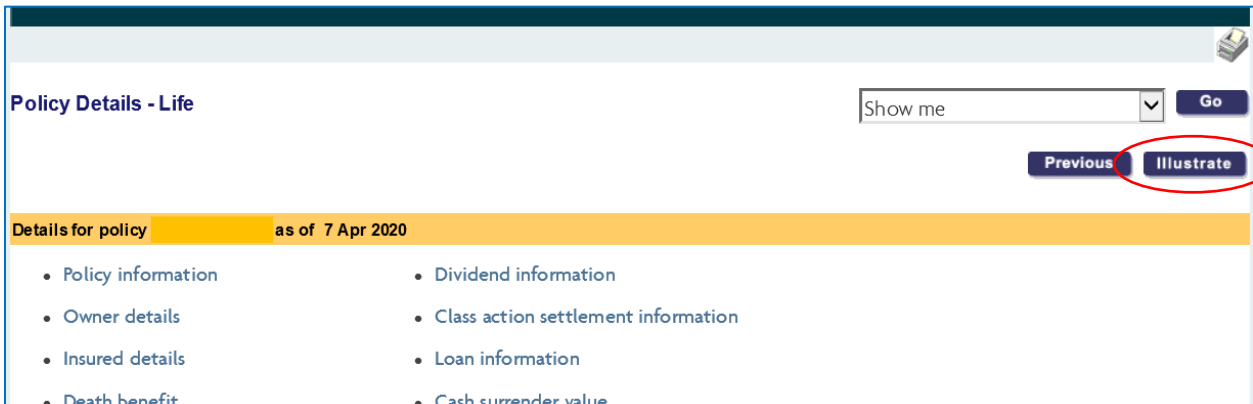
Last name or company name:

First Name:

Search

A Client Portfolio screen will be visible and at the bottom will be a list of policies that meet your search criteria. Click on the policy that you want to illustrate.

Next, click the Illustrate button at the top right side of the page to generate the inforce illustration.



The screenshot shows the 'Policy Details - Life' interface. At the top right, there is a 'Show me' dropdown menu and a 'Go' button. Below these, there are two buttons: 'Previous' and 'Illustrate'. The 'Illustrate' button is circled in red. Below the buttons, there is a yellow header bar that reads 'Details for policy as of 7 Apr 2020'. Underneath this bar, there is a list of links for policy details, including 'Policy information', 'Owner details', 'Insured details', 'Death benefit', 'Dividend information', 'Class action settlement information', 'Loan information', and 'Cash surrender value'.

After this step, a PDF of the illustration should appear. If you receive an error, please order an inforce illustration through the Request centre.