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?

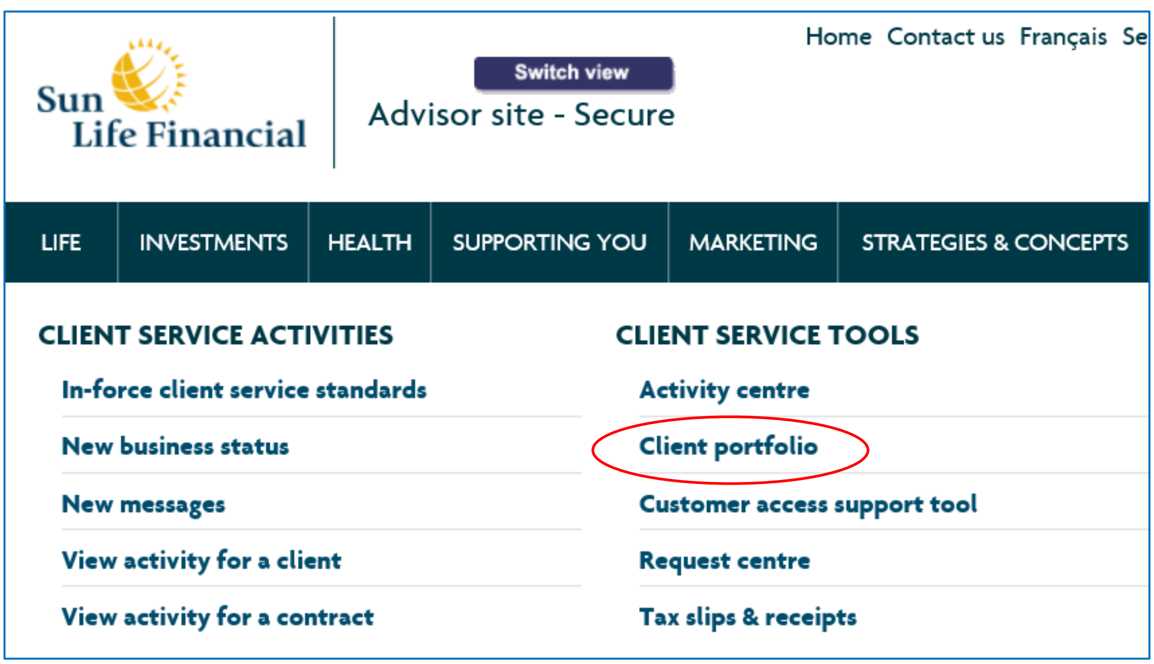
• Is it a participating (PAR) policy issued since 2010?	Yes ☐	No ☐
• Do you need a Non-withdrawable premium fund (NWPF) illustration?	Yes ☐	No ☐
• Are there paid-up additions (PUAs) on the policy, but the dividend option is not PUA?	Yes ☐	No ☐
• Is the dividend option Loan Reduction?	Yes ☐	No ☐
• Is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

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

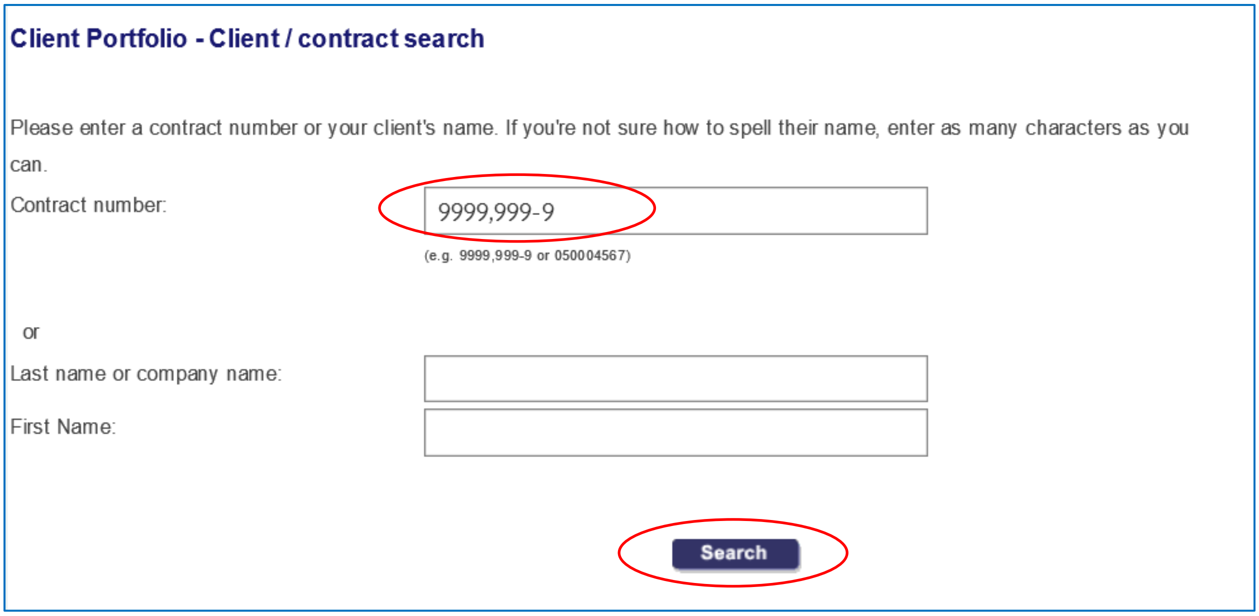
If you answered 'Yes' to any of these questions, you will need to order an in-force illustration through the Request centre.

How to generate inforce illustrations online

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

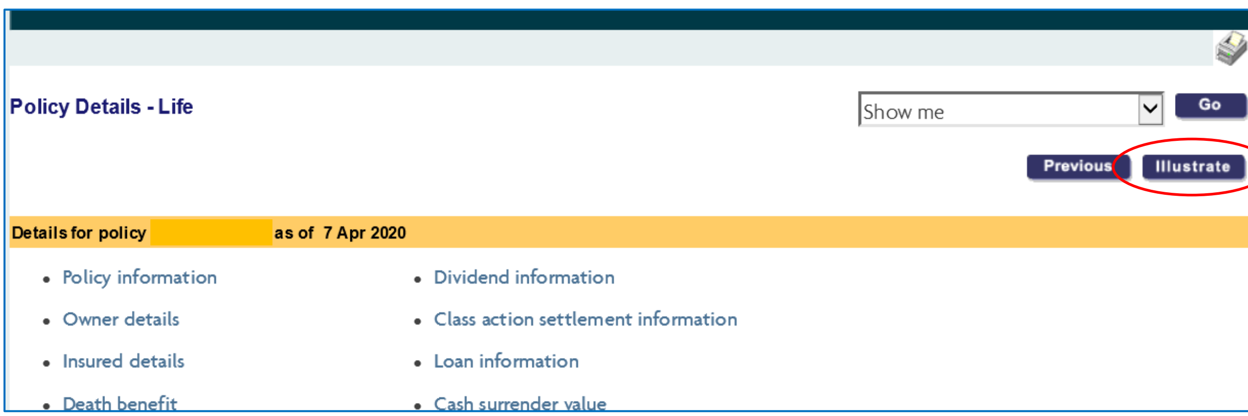


Enter the contract number and search for the policy.



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.



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