



Commitment to customers

Empowering our customers to act. Sun Life Financial’s mission to help customers achieve lifetime financial security evolved to a new level in 2008. Across the organization, Sun Life employees adopted a new brand promise based on empowering people to take action for their financial future. Working with this new brand promise will reinforce our ability to provide uniquely positive customer experiences to individual consumers, plan sponsors and plan members around the world.

Canada

DIALOGUE WITH OUR CLIENTS

Feedback is vital to our relationships with clients. In Canada, our Group Retirement Services and Group Benefits business units hold regular meetings with major corporate clients and with selected advisors who have group clients. The learning from these councils allows us to develop products and services that meet, and often exceed, our clients’ evolving needs.

HEALTHY RETURNS

Healthy RETURNS is our innovative strategy and framework for helping plan sponsors and their members generate a positive return on their investment in health management by creating a healthier workplace – thereby reducing disability absences.

WORKPLACE SOLUTIONS PROGRAM

Our Workplace Solutions program, offered through our Individual Insurance and Investments business unit, provides plan members with no-cost, on-site education and professional advice from advisors in our Career Sales Force. Plan members in participating group plans can also access one-on-one telephone advice on investment choices. Our Customer Solutions Centre’s licensed service representatives are also available to help individuals understand their coverage and investment options when they leave their group benefit plan.

TAX-FREE SAVINGS ACCOUNTS

Canadians now have access to Canada’s newest product for saving: the Tax-Free Savings Account (TFSA). They can access this product from Sun Life, either through their workplace plan, or directly as an individual with the support of an advisor.

RESOLVING CUSTOMER COMPLAINTS

Sun Life has a dedicated Ombudsman and team of senior consultants who help identify and eliminate obstacles in resolving customer complaints. They approach the role with objectivity, and act impartially for both the customer and the Company. Our Ombudsman is connected with government regulators, the Canadian Life and Health Insurance OmbudService, and with Ombudsmen from other insurance companies.

More information on our complaint escalation process is available on our website at www.sunlife.ca/ComplaintProcess.

Asia

THE SOLAR STUDY

In Asia, we instituted a study called SOLAR, which stands for *Study of Lifestyles, Attitudes and Relationships*. In this study, consumers express needs related to their financial security. Insights from SOLAR are driving the development and creation of market-specific products that are sensitive to the needs of consumers in Asia’s many markets.

CONVENIENCE AND PRIVACY FOR CUSTOMERS

Our Sun Life Financial Cafés, located in Hong Kong and Manila, provide comfortable, convenient meeting places within these crowded cities, where customers can discuss their financial matters with an advisor, in privacy.

United States

EASE OF DOING BUSINESS

In 2008, our U.S. operation redesigned the Variable Annuity customer application to be clearer and more customer friendly in both language and format. We also reorganized and enhanced some of our client welcome kits. Both initiatives improved the customer experience and made it easier to do business with us.