



August 16, 2017

Employee Ins Services Inc
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Anytown, US 12345
broker@EMAIL.COM

Important changes to the Assurant Employee Benefits plan(s) for ABC Company, Inc., Policy # 1234567/0.

Dear Valued Business Partner,

As you know, Sun Life Assurance Company of Canada acquired Assurant's employee benefits business in March of 2016. We've been working hard to integrate the businesses so Clients can benefit from our broadened product portfolio, enhanced online capabilities, and continued support from the same sales and service teams in place today.

The final step is the conversion of Assurant Employee Benefits plans to Sun Life contracts. We are writing to share that ABC Company, Inc.'s current Assurant Employee Benefits policy(ies) is eligible to convert to comparable Sun Life contract(s) effective 11/01/2017.

Attached is a copy of the conversion package, which will be sent out to your Client prior to the effective date of the Sun Life contract.¹ Following the conversion package and prior to the effective date of the new Sun Life plan(s), we will provide replacement policy(ies) and detailed transition materials.

You will experience some enhancements and changes as we transition Clients. Below are a few highlights, and we are always happy to help you if you have any questions.

Commissions

- To continue receiving commission payments, you'll need to become appointed with Sun Life Assurance Company of Canada if you have not already. Visit our [Get appointed web page \(www.sunlife.com/getappointednow\)](http://www.sunlife.com/getappointednow) to download and complete the applicable appointment package.
- To sign up for direct deposit with Sun Life Assurance Company of Canada, you may complete and return the direct deposit form within the appointment package.
- Your commissions under the new plan(s) will match your current commission scales for conversion business. Please consult with your Sun Life representative for more information about commissions for new business.
- The timing of commission payments will be similar to what they have been.

Administration

- Your Client will start administering benefits on Sun Life's web portal, Sun Life Connect. If you've been administering benefits on behalf of your Client, you will need to request that your Client grant you access through Sun Life Connect as an administrator.
- You will continue to use your existing web portal, Online Advantage, to access information about your block of business and commissions. Note: converted business will not immediately be available in your block of business in Online Advantage.

We are committed to making this process easy for you and your Clients. Please don't hesitate to contact Sun Life's Transition Services team or visit www.sunlife.com/conversion if you have any questions.

Sincerely,

Transition Service Team
Sun Life Financial
877-645-4363
transition.services@sunlife.com

1. Clients' plans will convert so long as they meet the Minimum Participation Requirements as provided in the Schedule of the policy. Clients' plans will convert in conjunction with the rate effective date, subject to the expiration of the Client's longest-running plan rate guarantee for the policy. If you have multiple Clients with an Assurant Employee Benefits policy, conversion dates may differ from Client to Client based on the unique aspects of that Client's coverage.

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