

# Request for Service Advisor



## 1 Policy owner

I request that Sun Life Assurance Company of Canada assign the Service Advisor below to the list of policy contracts.  
 Include all policy/account numbers.

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### Policy owner or Authorized Signing Officer

|   |           |                   |
|---|-----------|-------------------|
| First name  | Last name |                   |
| Signature of policy owner or authorized signing officer |           | Date (dd-mm-yyyy) |
| <input checked="" type="checkbox"/>                     |           |                   |

## 2 Service Advisor (to be completed by the Service Advisor)

Section to be completed by Service Advisor

|  |  |
|--|--|
| First and last name or corporation name of Advisor<br>David E. Kakon |  |
| Name of distribution firm (MGA, NA, Branch)<br>IDC-WIN               | Sun Life Advisor code<br>M077570       |
| Advisor email address<br>David@ArmstrongLife.net                     | Advisor phone number<br>(514) 574-0233 |
| Signature of Service Advisor<br>X                                    | Date (dd-mm-yyyy)                      |

Are you an immediate family member of the policy owner (spouse, parent, child only)?  Yes  No

**PLEASE NOTE:** THE CURRENT ADVISOR OF RECORD WILL BE MADE AWARE OF THIS REQUEST CHANGE AS PART OF THE AOR REVIEW PROCESS.

**Please send form:**

- a. AOR change within SLFD Distribution channel, please send to [BIFCOMM@sunlife.com](mailto:BIFCOMM@sunlife.com)
- b. AOR change between SLFD Distribution channel and Independent Insurance Distribution channel, please send to [BIFCOMM@sunlife.com](mailto:BIFCOMM@sunlife.com)
- c. AOR change within Independent Insurance Distribution channel, please send to [REMUN@sunlife.com](mailto:REMUN@sunlife.com)

### Respecting your privacy

Respecting your privacy is a priority for the Sun Life group of companies. We keep in confidence personal information about you and the products and services you have with us to provide you with investment, retirement and insurance products and services to help you meet your lifetime financial objectives. To meet these objectives, we collect, use and disclose your personal information for purposes that include: underwriting; administration; claims adjudication; protecting against fraud, errors or misrepresentations; meeting legal, regulatory or contractual requirements; and we may tell you about other related products and services that we believe meet your changing needs. The only people who have access to your personal information are our employees, distribution partners such as advisors, and third-party service providers, along with our reinsurers. We will also provide access to anyone else you authorize. Sometimes, unless we are otherwise prohibited, these people may be in countries outside Canada, so your personal information may be subject to the laws of those countries. You can ask for the information in our files about you and, if necessary, ask us in writing to correct it. To find out more about our privacy practices, visit [www.sunlife.ca/privacy](http://www.sunlife.ca/privacy).