

Unclaimed property search request

Requestor

Last name		First name	
Address (street number and name)		Apartment or suite	
City		Province	Postal code
Phone number	Email address		

* Provide a photocopy of the two pieces of identification, at least one of which is photo ID.

1. Is the Unclaimed Property part of an Individual Plan? or Group Plan?
2. What is your affiliation to the Unclaimed Property (for example: owner/member, life insured, beneficiary, executor, relative, attorney etc.)?

3. Is the owner/member of the unclaimed property still living? Yes No

Date (dd-mm-yyyy)

If No, please provide the date of death.

* If the request is coming from someone other than the owner, the following will be required:

- Copies of two pieces of identification, at least one of which is a photo ID; and,
- Proof of the person's entitlement to receive the information, such as a power of attorney from the owner, (if the owner is still alive); or,
- Proof that the Requester is the executor of the estate of the former owner; or,
- Proof that the executor has consented to the release of information if the owner is not alive.

Provide the following information if known:

Description of unclaimed property <input type="checkbox"/> Insurance product <input type="checkbox"/> Savings product <input type="checkbox"/> Trust product		
Policy number	Company that issued the policy	Date of policy issue (dd-mm-yyyy)
Last name of owner/member	First name	Owner/member's date of birth (dd-mm-yyyy)
Relationship to owner/member	Name of life insured (if life insurance policy)	

If this search is unsuccessful, further assistance may be obtained as follows:

- For residents in Alberta, please refer to the Government of Alberta website at www.finance.alberta.ca/business/unclaimed_property/index.html.
- For residents of British Columbia, please visit the British Columbia Unclaimed Property Society website at www.unclaimedpropertybc.ca.
- For residents of Quebec, please refer to the Revenue Quebec website at www.revenuquebec.ca/en/.
- For further assistance in tracing predecessor companies please visit the Canadian Life and Health Insurance Association at their website www.clhia.ca.

Submit the completed questionnaire along with required documentation to:

Sun Life Financial Ombudsman's Office
227 King Street South
Waterloo, ON N2J 1R2

Please allow 4 to 6 weeks for a complete search at which time you will be contacted.

Respecting your privacy

Respecting your privacy is a priority for the Sun Life Financial 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.

I certify that the information in this form is true and correct and that I am authorized to disclose the information provided on this form to Sun Life Assurance Company of Canada ("Sun Life"), its agents and service providers. I hereby consent to the collection, use and disclosure of this information by Sun Life, its agents and service providers, to its subsidiaries and affiliates, some of which may be located outside of Canada, for the purposes of conducting an unclaimed property search of its own records and disclosing the results of its search to me.

Sun Life Assurance Company of Canada is a member of the Sun Life Financial group of companies.