

Insured Tax Forms

Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies, is committed to keeping your information confidential.

Tax Forms to be completed with the Contract Holder

The following information must be provided to ensure the proper administration of taxes in connection with the Contract Holder's benefits plan(s) with Sun Life Assurance Company of Canada.

Part A – Ontario Retail Sales Tax (RST) – For all Contract Holders with employees in Ontario

A Ontario Retail Sales Tax (RST)

To be completed by all Contract Holders with employees in Ontario

Ontario Retail Sales Tax (RST) - Remittance Election Form

Under the Ontario Retail Sales Tax Act, employers are required to remit, directly to the Ministry of Finance, the Ontario Retail Sales Tax (RST) collected on their members' contributions to the benefits plan if the members are Ontario residents, **unless**:

1. The employer is not a registered vendor, or
2. The employer specifically elects to send the RST to the insurer for payment to the Ministry of Finance.

For ease of retail sales tax administration and reconciliation, it is Sun Life Assurance Company of Canada's standard approach to collect and remit the full retail sales tax amount on behalf of Contract Holders. This form is the Contract Holder's certification confirming this approach.

Remittance Election Form for Ontario Retail Sales Tax

The Contract Holder must complete this form and return it to Sun Life Assurance Company of Canada and keep a copy of the completed form for its records.

Insured Contract No(s)	Contract Holder's Name	Business Name
Business Address		
City	Province	Postal Code
Nature of Business	Vendor Permit No (if applicable)	

The Contract Holder, pursuant to Regulations made under the Ontario Retail Sales Tax Act, elects to remit to Sun Life Assurance Company of Canada, all amounts of Retail Sales Tax that may be collected on member contributions under the contract(s) listed above. This election to remit RST to Sun Life Assurance Company of Canada applies for the duration of the contract(s), as specified in the Regulations.

Authorized Official's name (please print)	
Authorized Official's signature X	Date (d/m/y)

Ontario Retail Sales Tax (RST) - Blanket Purchase Exemption Certificate

Purchase Exemption Certificates (PECs) are to be completed by persons or organizations who are entitled to claim an exemption from RST when entering into a benefits plan contract. This certificate is to be returned to Sun Life Assurance Company of Canada as the insurer.

The Contract Holder must complete this form and return it to Sun Life Assurance Company of Canada and keep a copy of the completed form for its records.

For complete details, Contract Holders may refer to #204 RST Guide: Purchase Exemption Certificates and #519 RST Guide: Insurance - General Information. Both of these guides are issued by the Ontario Retail Sales Tax branch.

If the Contract Holder wishes to claim any exemptions from RST, it must certify this intention by completing the following information.

Blanket Purchase Exemption Certificate

Insured Contract No(s)	Contract Holder's Name	Business Name
Business Address		
City	Province	Postal Code
Nature of Business	Vendor Permit No (if applicable)	

A Ontario Retail Sales Tax (RST) (continued)

The Contract Holder claims exemption from Ontario Retail Sales Tax, under the provisions of the Ontario Retail Sales Tax Act, on the contract(s) listed above. Group Benefits under the above contract(s) are exempt from Ontario Retail Sales Tax for the following:

- Members who ordinarily work outside Ontario or whose salary is ordinarily paid outside Ontario
- Contributions paid by members who are not ordinarily residents of Ontario
- Former members who are no longer resident in Ontario
- Status Indians resident on a reserve

This certification is valid for the duration of the contract(s), as specified in the Regulations.

Authorized Official's name (please print)	
Authorized Official's signature X	Date (d/m/y)

Important: The person or organization entering into a Contract for which an exemption is claimed must complete this certificate and give it to Sun Life Assurance Company of Canada as the insurer. Sun Life Assurance Company of Canada will keep this form as required under the Regulations for the Ontario Retail Sales Tax Act.