

# Unclaimed property – policy search request



## 1. Your information

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

What is your relationship to the policy (e.g., are you the owner/member, beneficiary, executor, relative, attorney or the insured, etc.)?

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## 2. About the policy

i. Is it an individual policy?  or Group Plan?  I don't know

*Policy owners usually purchase individual products on their own, while Group plans usually have members and are offered through an employer.*

ii. When was the policy owner/member born?

Date of birth (dd-mm-yyyy)

iii. Is the owner/member of the policy still living?  Yes  No

Date (dd-mm-yyyy)

If you answered No, please tell us the date they passed away:

iv. Fill out as much of this section as you can. If you don't know something, leave it blank.

Description of policy <input type="checkbox"/> Insurance product <input type="checkbox"/> Savings/Wealth product		
Policy number	Company that issued the policy	Date of policy issue (dd-mm-yyyy)
Last name of owner/member		First name of owner/member
Relationship to owner/member		Name of insured person (if insurance policy)

## 3. Confirm your identity

Please include copies of two pieces of identification (e.g. driver's licence, passport, birth certificate). At least one of them needs to include your picture.

**If you're not the policy owner**, you also need proof that you have permission to receive policy information from us. This could be:

- A will showing you're the executor of the owner's estate, **OR** a will naming another executor and a letter from that person giving us permission to release information to you.
- A document showing you're the beneficiary.
- Proof of Power of Attorney (POA). Please note, POA ends after someone passes away, so we can't consider it valid if this is the case.

## 4. Mail us your form and ID information

Send your completed form and identification documents to:

Sun Life Assurance Company of Canada  
Image Services, Policy Search Team  
227 King Street South  
PO Box 1601 STN Waterloo  
Waterloo, ON N2J 4C5

It may take some time for us to search our system. We'll get back to you in 4 to 6 weeks.

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).

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.

Print name	Signature X	Date signed (dd-mm-yyyy)
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