

Sun Life Complaint Handling Procedures Concerning Mutual Fund and Segregated Fund in Quebec

Sun Life has a complaint handling process (CHP) that we designed to make sure we're handling our Clients' complaints appropriately.

A summary of our complaint handling procedure is also available on sunlife.ca.

How to File a Complaint

If you want to file a complaint with Sun Life, you may contact head office by calling 1-877-SUN-LIFE (786-5433) or emailing service@sunlife.com. You may also contact your advisor or the district manager.

We assign all mutual fund and segregated fund complaints, verbal or written, to the appropriate team to review.

Complaint Handling Procedures (CHP)

We will send you an acknowledgement letter within five business days of receiving your complaint. The initial acknowledgement will include the contact information of the person we have assigned to review the complaint, along with this CHP document. We will review our internal records and any documents and statements from you and your advisor. Using this information, we will complete an objective review of your concern.

You will receive a written substantive response within 90 days of us receiving your complaint. The response will summarize your concern, our review, and the conclusion we reach. It will also remind you that you can:

- Provide further information for consideration.
- Escalate to Client Advocacy team.
- Submit your complaint to the Autorité des marchés financiers (AMF). You can reach the AMF at 1-877-525-0337, by email at information@lautorite.qc.ca or in writing using the complaint form available on their website at lautorite.qc.ca.

Settlements

If a financial settlement is offered, we may ask you to sign a release and waiver for legal reasons.

Contacting Sun Life

You may contact Sun Life to provide further information or to ask about the status of your complaint. The person assigned to your concern will be happy to help or you can service@sunlife.com.

