

Request for Suspension of Schedule A (Form 5500) Insurance Information

Sun Life Assurance Company of Canada (U.S.)

Sun Life Insurance and Annuity Company of New York



To request that Sun Life Assurance Company of Canada (U.S.) or Sun Life Insurance and Annuity Company of New York ("Sun Life Financial") suspend sending you Schedule A information concerning your policy(ies), please complete, sign and return this form to the address below.

Plan and Policyholder Information

Name of Plan
Name of Trustee/Administrator
Address of Trustee/Administrator

Contract Information

If suspension of Schedule A (Form 5500) reporting is being requested for more than 10 group/account numbers, submit additional request forms as necessary.

Group/Account Numbers:	
1. _____	6. _____
2. _____	7. _____
3. _____	8. _____
4. _____	9. _____
5. _____	10. _____

Nature of Exemption

State Nature of Exemption that applies to your plan

Policyholder Certification

Please return this original copy to the following address and retain a copy for your records.

Sun Life Financial
PO Box 9133
Wellesley Hills, MA 02481

For Overnight Mail ONLY:
Sun Life Financial
112 Worcester Street
Wellesley Hills, MA 02481

By signing below, the Trustee/Administrator certifies that the above information is accurate. Trustee/Administrator further acknowledges that Sun Life Financial will cease providing Schedule A information with respect to the aforementioned policies and will not resume sending Schedule A information until Trustee/Administrator otherwise notifies Sun Life Financial in writing. Trustee/Administrator acknowledges that Sun Life Financial is not a plan administrator and cannot provide legal advice. Trustee/Administrator acknowledges that it is solely responsible for determining its reporting and disclosure obligations under the Employee Retirement Income Security Act of 1974, as amended.

Print Name of Trustee/Administrator

Signature of Trustee/Administrator (**Note:** Only the Trustee/Administrator is authorized to sign.)

Date

Sun Life Assurance Company of Canada (U.S.) and Sun Life Insurance and Annuity Company of New York are members of the Sun Life Financial group of companies.
Sun Life Financial and the globe symbol are service marks of Sun Life Assurance Company of Canada and Sun Life Insurance and Annuity Company of New York.