

Non-Resident Information Form



Please return the completed form by mail or fax to:

Sun Life Financial
 P.O. Box 9133
 Wellesley Hills MA 02481
 Fax: (781) 304-5383

Generally, sales of insurance products should not be solicited outside the state where the applicant resides. However, in some cases, it may be permissible for an applicant to complete and sign an application for Sun Life Assurance Company of Canada (U.S.)¹ products in other states. Such transactions may be proper when the applicant has a significant nexus to the non-resident state, such as a second home, place of employment, or a pattern of business dealings that brings the applicant to the non-resident state.

In order for the Home Office to document the appropriateness of non-resident solicitation, completion of this form is an administrative requirement whenever an applicant applies for a Sun Life Assurance Company of Canada (U.S.) annuity in a state that is not his/her resident state.

Note: This form is not an application and does not become a part of the contract.

1. Applicant Information

Please PRINT clearly.

Name of Applicant		Application Date
Annuity Plan	Annuity Premium	
State of Residence	State of Solicitation	

Please check all options that apply.

Reason(s) for Solicitation Outside of Applicant's State of Residence:

- Second Home
- Place of Employment
- The applicant has regular business dealings in the non-resident state
- The applicant has a pre-existing relationship with broker of _____
(Time period)
- Other. If other, please explain reason below:

2. Signature

We hereby certify that the above information is true and complete and that the application was signed at the location stated in the application.

Signature of Applicant(s) X	Date (m/d/y)
Signature of Agent X	Date (m/d/y)

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