

Sun Life Assurance Company of Canada

Evidence of Insurability Cover Page



Employer Instructions

Complete this cover page and provide it to the employee.

- Printable EOI application**

If submitting the EOI application on paper, the applicant must include this Cover Page with his/her submission. Failure to include a completed Cover Page could delay the EOI process.

Employee/Dependent Information (To be completed by employer)

| | | | |
|--|---------------------------|---|---|
| Employee Name (first, middle initial, last) | | Group Policy Number | |
| Social Security Number (last four digits) | Approval Requested for | <input type="checkbox"/> Employee <input type="checkbox"/> Dependent Child(ren): | <input type="checkbox"/> Spouse No. of Children: |

Coverage(s) Subject to Evidence of Insurability (To be completed by employer)

Select coverage(s) for which EOI is required. Fill in Current Amount of coverage, or the Guaranteed Issue (GI) amount of the plan. Then fill in Requested Amount and Amount Subject to EOI. Sign and date here if employee is submitting the printable EOI form.

Life Insurance

| | Current Amount of Coverage (or GI) | Requested Amount | Amount Subject to EOI |
|--|--|---------------------|--------------------------|
| <input type="checkbox"/> Employee Basic | \$ | \$ | \$ |
| <input type="checkbox"/> Employee Optional | \$ | \$ | \$ |
| <input type="checkbox"/> Spouse Basic | \$ | \$ | \$ |
| <input type="checkbox"/> Spouse Optional | \$ | \$ | \$ |
| <input type="checkbox"/> Child Optional | \$ | \$ | \$ |

Other Coverages

| |
|--|
| <input type="checkbox"/> Short Term Disability |
| <input type="checkbox"/> Long Term Disability |
| <input type="checkbox"/> Buy-Up LTD: \$ |

| | |
|--|------|
| Signature of person completing this cover page (Employer) X | Date |
|--|------|

Need help determining EOI? Please see your **Group Policy** and the **Administrator's Guide**.

Employee Instructions

Complete and submit

the Printable EOI Application

- Printable EOI Application**

- Complete pages 1 and 2 of the EOI Application according to the instructions. You may type your answers into the fillable form and then print the document. Please remember to sign and date the form.
- Mail or Fax the EOI Application and this Employer Cover Page to us:

MAIL TO: The McKellan Group, Inc.
1449 Old Waterbury RD Suite #201
Southbury, CT 06488

-or- FAX TO: (203) 575-0308

Sun Life Assurance Company of Canada

Evidence of Insurability Application – Health Questionnaire

California / Connecticut / Illinois / Iowa / Kentucky / North Dakota / Ohio / Wisconsin



I Applicant Information (Please print clearly)

Complete and return pages 1 and 2 of this form, along with the employer cover page to:

The McKellan Group, Inc.
 1449 Old Waterbury RD
 Suite #201
 Southbury, CT 06488

Fax 203-575-0308

| | | | | | |
|---|--|------------------------|------|----------------------|-------|
| Your name (first, middle initial, last) | | Name of your employer | | Group policy no. | |
| Your street address | | | City | | State |
| Zip Code | | Social Security number | | Daytime phone number | |
| | | E-mail address | | | |

This Application is for: Employee Spouse Child Male Female

| | | | | | | | |
|--------------------------------|--|-----------------------|--|---------|--|--------|--|
| Name (if different than above) | | Date of birth (m/d/y) | | Height | | Weight | |
| | | | | ft. in. | | lbs. | |

II Health History (The information in sections II, III and IV is confidential and will not be shared with your employer)

Important: You must answer all questions. If you answer “Yes” to any question, please use the space in Section IV on page 2 to provide the details of your condition. Failure to provide the details of your condition will cause a delay in the review of your application.

1. In the past five years, have you:

- a. Had transplant surgery, other surgery, injuries or been treated in a hospital?..... Yes No
- b. Been treated for alcoholism or advised by a physician to change your drinking habits?. Yes No
- c. Used heroin, marijuana, cocaine, LSD, amphetamines, or any other narcotic?..... Yes No
- d. Been off work for more than five consecutive days due to illness or injury?..... Yes No
- e. Lost 20 lbs. or more over a 12 month period?..... Yes No

2. In the past five years, have you been diagnosed with, treated for or had any symptoms relating to any of the conditions listed below?

- a. Dizzy spells, epilepsy, a nervous or neurological disorder, migraines or a mental disorder..... Yes No
- b. Asthma, bronchitis, emphysema, chronic cough, shortness of breath, Chronic Obstructive Pulmonary Disease (COPD) or lung disorder..... Yes No
- c. Abnormal blood pressure, chest pain, heart murmur, heart disease or heart attack..... Yes No
- d. Ulcer, liver disorder, colitis, diarrhea or any complaint of the digestive organs..... Yes No
- e. Arthritis, gout, rheumatism, back disorder, disc disease or joint or bone disorder..... Yes No
- f. Cancer, tumor, enlarged glands, enlarged lymph nodes or lupus..... Yes No
- g. Sugar in urine, diabetes, kidney or bladder disorder..... Yes No
- h. Anemia, blood vessel disease, bleeding or any other blood disease or disorder..... Yes No
- i. Disorders of the eyes or ears..... Yes No
- j. Chronic fatigue or fibromyalgia..... Yes No

3. In the past five years, have you been diagnosed with or treated by a licensed medical physician for Acquired Immune Deficiency Syndrome (AIDS)?.....

- Yes No

4. Are you currently pregnant?.....

- Yes No

III Activities

Important: If you answer “Yes” to any question, use the space in section IV to list each activity, how often you participate in it and the last time you participated in it.

Do you engage in any of the following activities?

- a. Skydiving Yes No
- b. Scuba diving Yes No
- c. Vehicle or boat racing Yes No
- d. Piloting an aircraft Yes No

IV Detail (Provide detail below about any “Yes” answer from sections II and III.)

| Question number | Description/History of Condition (e.g. high blood pressure, recent BP reading etc.) | Date Condition Began | Duration of Condition/ Treatment | Treatment | Fully Recovered? <input type="checkbox"/> Yes <input type="checkbox"/> No |
|-----------------|---|----------------------|----------------------------------|-----------|---|
| | | | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |

If you need more room, check here and attach a separate sheet.

V Signature

Please read the Certification and sign and date the form below.

If an Authorization form is included in this package, please remember to sign and date all pages of the form and return it with your completed EOI Application.

Certification

I hereby certify, to the best of my knowledge and belief, that:

- The information I have provided in the Evidence of Insurability (EOI) Application is true, accurate and complete.
- I have read, or had read to me, the completed EOI Application and understand that any false statements or misrepresentation made in it may result in a loss of coverage under the Group Insurance Policy.
- I have read or had read to me the Fraud Warning:

Fraud Warning: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

I also hereby confirm my understanding that:

- My EOI Application may be denied and I may be refused insurance if Sun Life Assurance Company of Canada (“The Company”) determines that I am not insurable. If The Company determines that I am not insurable, it will explain in writing the basis of its determination.
- I may ask The Company in writing to: (a) obtain certain information from the EOI Application file relating to me (a fee may be charged); (b) correct, amend or delete information in the EOI Application file relating to me (as permitted by applicable law); (c) file my own statement of facts if I believe any information in the EOI Application file relating to me is incorrect; and (d) provide me with a copy of my EOI Application.
- If I have any questions regarding my EOI Application, I can write to Sun Life Assurance Company of Canada, Group Medical Underwriting., SC 7190, 15 Rye Street, Portsmouth, NH 03801.

| | |
|---|-------------|
| Signature of Employee X | Date signed |
| Signature of Spouse (If Application is for spouse) X | Date signed |