

Getting ready for your Tele-interview

Convenient
Comfortable
Confidential

Sun Life Financial and Hooper Holmes Canada have formed a partnership and are pleased to help you complete the insurance application by conducting a telephone interview. Shortly after you meet with your advisor, a Hooper Holmes representative will call and ask you a series of questions in order to complete the rest of the insurance application process in a convenient, comfortable and confidential way.

CONVENIENT How the tele-interview works

When the tele-interview representative calls you, they'll start off by stating that they are calling on behalf of Sun Life Financial and will ask if this is a convenient time. They will ask you a few questions to verify that they're speaking with the correct person and inform you the call is being recorded. After receiving confirmation, the representative will ask you a number of questions about your lifestyle, your immediate family's health history and your personal health history.

At the end of the interview, you will be asked to confirm you have answered all the questions truthfully and completely. The interview will take approximately 20 minutes but can vary in length depending on the amount of information we need to gather from you. If you are not available when the representative calls, they will leave a message and try calling you back the next day. Unless otherwise specified, a representative will leave a message every other day until you are reached. If the representative cannot reach you at the time you indicated on the application, then they may try to reach you at different times throughout the day.

COMFORTABLE Preparing for the tele-interview

You can help speed up the tele-interview and ensure it goes smoothly by being prepared. You may want to make note of the following information that will be requested:

- **Name, address and phone number of your medical advisor/clinic**, and the date of your last checkup.
- **Lifestyle questions** such as tobacco use, alcohol consumption, driving record, foreign travel outside of Canada and the United States and recreational activities.
- **Your parents' and siblings' health history.**
- **Name and dosage of any medications**, in case that information is requested.

If the interview involves an application on a child, here are some additional details:

- **The parent who consented to the life insurance on the child** will receive a call from Hooper Holmes.
- The parent will be asked about **the child's height, weight and personal medical history**, as well as some health questions on their own immediate family.

CONFIDENTIAL Protecting your privacy

At Sun Life Financial, we are committed to the highest standards of care to protect and ensure the personal information we collect from applicants and the proposed insured is accurate, up-to-date, confidential and secure. The information collected during the tele-interview becomes part of your application and is submitted to Sun Life Financial. The tele-interview questions and answers will be transcribed into writing and will form part of the insurance contract that you receive. For additional information on Sun Life Financial's privacy policy for Canada, please go to www.sunlife.ca.

In addition to the tele-interview, there may be some additional tests or services required. If that is the case, an appointment will be set up separately and you will be contacted by a health provider approved by Sun Life Financial.

During your tele-interview:

You will be asked a series of questions about the conditions listed below. You may be asked additional questions about the date of diagnosis, treatment and the current status of the condition.

We recognize that the tele-interview involves asking many questions about your health, and we appreciate your patience answering these. To avoid delays in the application process it is important to answer these questions as completely as possible. If at any time the interviewer goes too quickly, or you need a moment to think about a question, please ask your interviewer to pause. We want you to take the time you need to complete the application with full disclosure.

To help you follow along during the tele-interview you may wish to refer to this chart of medical conditions. The left side of the chart lists the categories of questions you will be asked about and the right side of the chart lists specific conditions within those categories that you may be asked about.

Heart and circulatory	High blood pressure (hypertension), high cholesterol, angina, chest pain, heart attack, coronary artery disease (CAD), transient ischemic attack (TIA), stroke or cerebrovascular accident (CVA), heart murmur, irregular pulse, blood clot(s), peripheral vascular disease (poor circulation), aneurysm
Abnormal growths or malignancy	Cancer, leukemia, lymphoma, melanoma, dysplastic nevus (atypical mole), basal cell carcinoma, tumour, cyst(s), polyp(s)
Glands and/or endocrine system	Diabetes, gestational diabetes, abnormal blood sugar, goitre, hyperthyroidism, hypothyroidism, lymph or gland disease or disorder
Blood	Anemia, hemophilia, bleeding disorder
Gastrointestinal	Hepatitis (including hepatitis carrier state), cirrhosis, jaundice, Crohn's disease, ulcerative colitis, irritable bowel syndrome, diverticulitis, persistent diarrhea, rectal or intestinal bleeding, ulcer (peptic or gastric), pancreatitis
Eyes, ears, nose, throat and mouth	Blindness, loss of vision, glaucoma, optic neuritis, deafness, impaired hearing, labyrinthitis
Respiratory system	Asthma, chronic obstructive pulmonary disease (COPD) or emphysema, chronic or recurrent bronchitis, sleep apnea, sarcoidosis, cystic fibrosis, tuberculosis, persistent cough, difficulty breathing, shortness of breath or hoarseness
Mental health	Chronic anxiety, depression, burnout, chronic fatigue syndrome, attention deficit disorder (ADD), eating disorder, schizophrenia, attempted suicide
Skin and connective tissue	Lupus, scleroderma
Genitourinary	Breast lump(s) or cyst(s), abnormal mammogram, abnormal pap smear, hysterectomy, disease or disorder of the ovary or uterus, abnormal prostate specific antigen (PSA), prostatitis or prostate disorder, sexually transmitted disease, disease or disorder of the genital organs, kidney stone(s), nephritis, urinary tract infection, sugar, blood or protein in the urine
Musculoskeletal	Arthritis, fibromyalgia, muscular dystrophy, paralysis, numbness or weakness of an arm or leg
Nervous system	Autism, cerebral palsy, Down syndrome, developmental delay, epilepsy or seizure(s), multiple sclerosis (MS), loss of balance, consciousness, sensation or speech, coma, concussion, severe headache(s), dizziness, fainting, Parkinson's disease, tremor, Alzheimer's disease, dementia or cognitive impairment, amyotrophic lateral sclerosis (ALS)

Contact us toll free at **1-855-491-9604** if you would like to return a call, reschedule your interview, or provide additional information.

Life's brighter under the sun