



ONLINE WILL PREPARATION AND  
CLAIMANT SUPPORT SERVICES

Benefits you  
can use today

**Sun**   
**Life Financial®**

# Welcome

At Sun Life, we are pleased to offer you Online Will Preparation and Claimant Support Services through ComPsych® Corporation. These services are included with your Life insurance plan.





## Online Will Preparation

A will is the cornerstone of any estate plan and can protect your assets and loved ones. Through an easy-to-use secure website, you and your spouse can now create and download a will in about 20 minutes. This service includes the following:

- step-by-step guidance and customization for your unique situation,
- glossary of legal definitions,
- ability to name an executor to carry out your wishes and a guardian(s) to care for your children,
- ability to create a living will (for an additional fee), and
- ability to create a final arrangements document (for an additional fee).

## Claimant Support Services

Losing a loved one or becoming disabled can be overwhelming to say the least. With Claimant Support Services, you have access to no-cost, objective financial planning, legal information, and emotional support, if you or your family member has filed a claim with us.

You can receive the following:

- up to five telephonic professional counseling sessions per claim for legal, financial, and emotional assistance,
- 24x7 access to counseling provided by ComPsych's on-staff professionals, including clinicians, licensed attorneys, CPAs, CFPs, and other financial experts,
- assistance with topics such as inheritance taxes, loss of income, creditors, and probate, and
- support dealing with trauma, loss, and adjusting to a reduced quality of life, and other concerns.

ComPsych's professionals do not sell financial products and do not receive commissions, so you can rest assured that you will receive the information you need to help during a difficult time.

Getting the help you need to face life's challenges and planning ahead to protect your loved ones can go a long way.

Remove and keep this reference card handy so you can take advantage of these services if or when you need to.



## Online Will Preparation

To protect your assets and loved ones, you can go online to create and download a will at:

[www.EstateGuidance.com](http://www.EstateGuidance.com)

Promotional code is:  
**SLF4VAS**

Online Will Preparation provided by ComPsych to active employees enrolled in Sun Life's Life insurance. This service is not insurance.

## Claimant Support Services

If you need to talk to a counselor or need legal or financial information because of a Life or Disability insurance claim with Sun Life, you can call ComPsych for no-cost, objective assistance.

**888-475-3827**

Claimant Support Services provided by ComPsych to Sun Life's Life insurance claimants and beneficiaries. Up to five counseling sessions per claim. This service is not insurance.



## About ComPsych

Founded in 1984, ComPsych® Corporation is the world's largest provider of employee assistance programs (EAPs) and is a pioneer and worldwide leader of fully integrated EAP, behavioral health, wellness, work-life, HR, FMLA and absence management services under its GuidanceResources® brand. The company serves more than 33,000 organizations, covering more than 89 million individuals throughout the U.S. and over 130 countries.

Visit [www.compsych.com](http://www.compsych.com) to learn more.

Value-added services are not available with group policies issued in New York on or after April 1, 2018.

Value-added services are offered only on specific lines of coverage, and carry a separate charge, which is added to the cost of the insurance. The cost is included in the total amount billed. Online Will Preparation and Claimant Support Services are not insurance and are provided by ComPsych®. ComPsych® and EstateGuidance® are registered trademarks of ComPsych Corporation. Sun Life is not responsible or liable for care, services, or advice given by any provider or vendor of the Services. Sun Life reserves the right to discontinue any of the Services at any time.

Group insurance policies are underwritten by Sun Life Assurance Company of Canada (Wellesley Hills, MA) in all states, except New York, under Policy Form Series 93P-LH, 98P-ADD, 07-SL, 01C-LH-PT, GP-A, GC-A, 12-GP-01, 12-DI-C-01, 12-SD-C-01, 13-SD-C-01, 12-SD-R-01, 13-SD-R-01, 12-AC-C-01, 12-AC-R-01, and 12-AC-R-02. In New York, group insurance policies are underwritten by Sun Life and Health Insurance Company (U.S.) (Windsor, CT) under Policy Form Series 13-GP-LH-01, 13-LF-C-01, 13-GPORT-P-01, 13-LFPort-C-01, 13-ADD-C-01, 13-LTD-C-01, 13-LTD-P-01, 13-STD-C-01, 06P-NY-DBL, 12-DI-C-01, 12-AC-C-01, 07-NYSL REV 7-12, GP-A-1, and GC-A-1. Product offerings may not be available in all states and may vary depending on state laws and regulations.

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