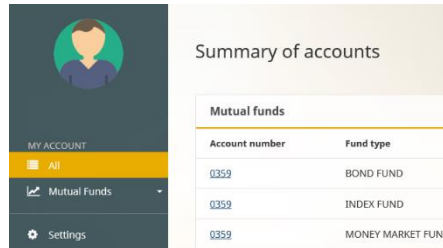


What is an e-SOA?

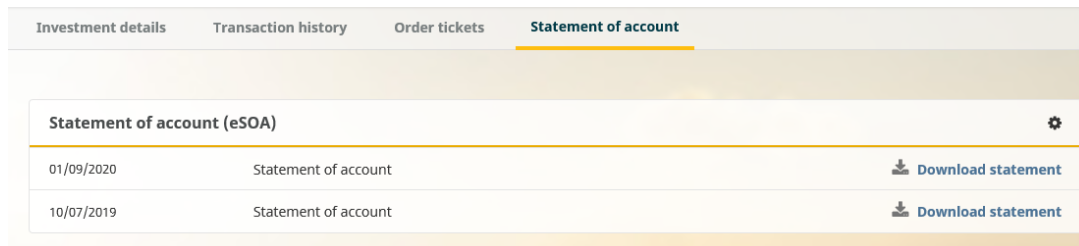
The e-SOA or Electronic Statement of Account is a digital version of your quarterly statement. This can be accessed through the Client Portal.

How do I view my e-SOA?

1. Log-in to your My Sun Life Client Portal account. At the left panel, click **All** and you will see your **summary of accounts**.



2. Click your MF account number(s) and click the **Statement of account** tab. Click **Download Statement** to access your e-SOAs.



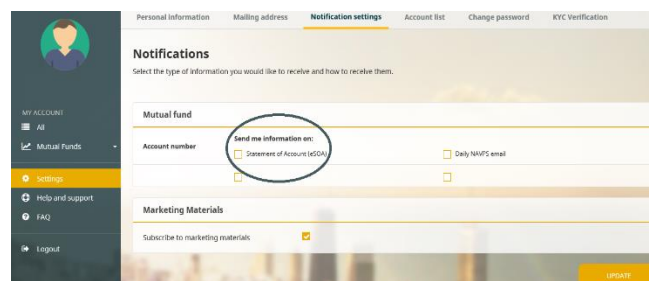
Up to how many e-SOAs are reflected on the Portal?

The My Sun Life Client Portal will contain your e-SOAs for the past two (2) years or a total of eight (8) quarters. Do note though that e-SOAs become available in the Client Portal only after subscribing to the facility.

Previous statements that were printed and delivered to you will not be available for viewing in the portal.

How do I subscribe/unsubscribe to the e-SOA facility?

1. Log-in to your My Sun Life Client Portal account.
2. Click **Settings** at the left panel and go to **Notification Settings**. Under **Mutual Fund**, tick the **Statement of Account (eSOA)** checkbox and click **Update**.



3. Once done, your changes will be saved. You are now subscribed to e-SOA. You will receive an e-mail confirming your subscription.
4. To **unsubscribe**, untick the checkbox and click Update.

Can I access the e-SOA in the Sun Life PH Mobile App?

Not at the moment. You can log in, register, subscribe to e-SOA, and access your statements via desktop or through your mobile internet browser.

When does my e-SOA become available?

Your quarterly e-SOA becomes available four weeks after the end of each calendar quarter. However, please note that there may be delays in uploading. A notice from sunlink@sunlife.com will be sent to your registered e-mail once the e-SOA is available for viewing.

Will I be charged a fee if I subscribe to e-SOA?

No. Subscribing to the e-SOA facility is free of charge.

I already have a Client Portal account for my insurance policy. Can I consolidate my insurance policy and Mutual Fund account(s)?

Yes, you may consolidate your insurance policy and Mutual Fund account(s) by sending an e-mail to sunlink@sunlife.com to request consolidation of your accounts. Please make sure to state your policy number and your Mutual Fund (MF) account number in the e-mail.

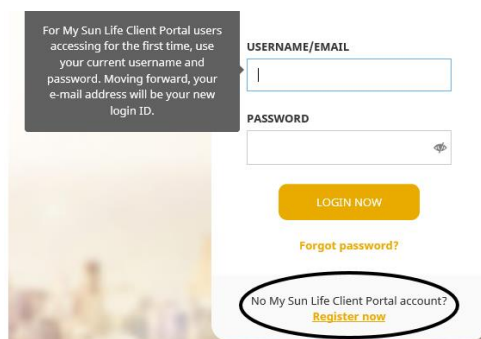
How do I register my Mutual Fund (MF) account to the My Sun Life Client Portal?

Pre-Registration: If you are a new Sun Life client, you will be pre-registered to the Client Portal. An activation link will be sent to your registered e-mail and you have **15 days** to activate your account. In case the activation link is no longer valid, you may register to Client Portal in two ways:

1. Contact **Client Care** at sunlink@sunlife.com or (02) 8-849-9888 to request for a new activation link. You will have **48 hours** to activate.
2. Through manual registration

Manual Registration: If you prefer signing up manually, please follow these steps:

1. Go to bit.ly/MySunLifeAccount and click **Register Now**.



For My Sun Life Client Portal users accessing for the first time, use your current username and password. Moving forward, your e-mail address will be your new login ID.

USERNAME/EMAIL

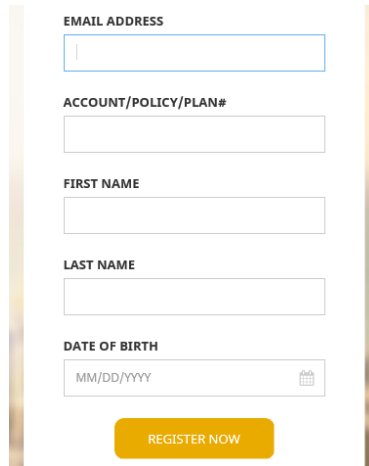
PASSWORD

LOGIN NOW

[Forgot password?](#)

No My Sun Life Client Portal account?
[Register now](#)

2. Enter the required details and submit.




EMAIL ADDRESS

ACCOUNT/POLICY/PLAN#

FIRST NAME

LAST NAME

DATE OF BIRTH
 

[REGISTER NOW](#)

The initial and temporary password will be sent directly to your registered e-mail address. You need to click on the link provided to confirm your registration. You have **48 hours** from the receipt of e-mail to activate your account.

You may learn more about the My Sun Life Client Portal and the Sun Life PH Mobile App [here](#).

I am accomplishing the Registration Form, but I don't know what my account number is. Where can I find this?

You can find your account number at the upper right portion of your previous Statement(s) of Account. You may also get in touch with us at slamc@sunlife.com for assistance.

Will I still receive printed statements of account if I subscribe to the e-SOA facility?

No. When you subscribe to e-SOA, your quarterly statements will be sent to you electronically moving forward unless you unsubscribe to the facility.

Can I choose to receive a printed statement of account later on?

Yes. If you prefer to receive printed copies of your statements, you may reach out to us at **8-849-9888** or slamc@sunlife.com.