

Sun Life PlanSource Advantage (PSA) Program

For purposes of the Sun Life PSA Program: “Sun Life” means Sun Life Assurance Company of Canada.

“Eligible Employer Groups” means those employer groups to whom PlanSource provides certain services under a written agreement, and who may elect to purchase certain Eligible Product Lines under the PSA Program.

“Eligible Product Lines” means those Sun Life products that PlanSource will offer to Eligible Employer Groups under the PSA Program.

Under the PSA Program, Eligible Employer Groups may earn monetary credits for offering Eligible Product Lines to its employees. Credits to each Eligible Employer Group are based on each Eligible Product Line multiplied by the number of employees enrolled in such product. PlanSource will apply any credits earned under the Sun Life program to an Employer Group’s account in the first month that the group goes live on PlanSource.

The Eligible Product Lines and respective credit amounts for the Sun Life program are listed below in Table 1, with additional notes below:

- Credits apply to new and existing lines of business with at least 1 worksite line
- Maximum credit of \$2 PEPM offered
- Payment to platform is based on highest number of enrolled employees
- Credits apply in the first month that the group goes live with PlanSource
- Underwriting required to be approved. Worksite products require 10% minimum participation

Table 1. Eligible Product Lines for Carrier

Eligible Product Line	Valid Geographic Markets	Valid Employer Sizes	Product Line Credit
Worksite Lines			
Accident	All	50 – 2,000 Employees	\$0.50
Cancer Indemnity	All	50 – 2,000 Employees	\$0.50
Critical Illness	All	50 – 2,000 Employees	\$0.50
Traditional Products			
Basic Life	All	50 – 2,000 Employees	\$0.25
Basic or Voluntary LTD	All	50 – 2,000 Employees	\$0.25
Basic or Voluntary STD	All	50 – 2,000 Employees	\$0.25
Dental (hi/lo, dual or triple choice count as one product)	All	50 – 2,000 Employees	\$0.25
Vision	All	50 – 2,000 Employees	\$0.25
Voluntary Life	All	50 – 2,000 Employees	\$0.25