ADVISOR CANDIDATE GUIDE

Your path to becoming a Sun Life advisor

Everything you need to go from your first career talk to your first day as a coded advisor at Neem Tree NBO, one step at a time.

Neem Tree NBO

Sun Life of Canada (Philippines), Inc.

Welcome. Here's how it works.

Becoming a Sun Life advisor takes 14 steps in four stages. Each step in this guide tells you what happens, what you need to do, and what comes next. Your recruiter walks with you the whole way.

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STAGE 1

Get ready

Learn about the career and earn your first two certificates.

1 Career presentation

Learn what a Sun Life advisor career looks like and how Neem Tree works.

- Attend the career presentation or a Live Brighter Forum.
- Bring your questions. There are no wrong ones.

LINKS **Career presentation deck**

Next → Tell your recruiter you'd like to continue.

2 Insurance Concept review

Watch three short review videos, then take the Official Simulated Exam. Passing it gives you the certificate you need before you can be enrolled for the licensing exam.

- Watch the videos. The password for all three is **sl_brightbox**.
- Parts 1 and 2 cover Traditional/Life and IIAP. Part 3 covers Variable (VUL).
- Take the Official Simulated Exam and keep your certificate.

> Use only the official Simulated Exam link in this guide. Older links may no longer work.

LINKS **Video Part 1** · **Video Part 2** · **Video Part 3** · **Official Simulated Exam**

Next → Enroll in SLTC.

3 SLTC enrollment

After your Insurance Concept certificate, enroll in SLTC. Your SLTC certificate is one of your licensing requirements.

- Both certificates are valid for one year.
- Your Insurance Concept certificate must be dated before your exam.

LINKS **SLTC enrollment page**

Next → Register for your licensing exam.

STAGE 2

Get licensed

Choose your exam, prepare, and pass.

4 Register for your exam

Your recruiter helps you choose between the **IC exam** (Life and Variable) and the **IIAP exam** (Life/Traditional only), then registers you for a date.

- **IIAP:** you need an active LiveBrighter Portal (LBP) account. Your recruiter enrolls you in the IIAP Online Training at the Brighter Learning Hub. Log in with your LBP email and password, then enter the one-time code.
- **IIAP forms:** after the training, your recruiter requests IIAP Form 0930 and the Exam Undertaking for you.
- **IIAP fee:** ₱1,300 online or ₱1,000 onsite/offsite, paid to BPI, Sun Life of Canada (Phils), Inc., 0993015679. A screenshot of the completed transfer is your proof.
- **Send your recruiter:** one PDF with Form 0930, the Exam Undertaking, your 1x1 photo (yellow background) and a valid government ID, in that order. Send your proof of payment and the Examinees Template as separate files.
- **IC:** the fee is ₱1,010 per license. Your recruiter registers you and gives you the payment instructions.

> **Exam dates change often.** Your recruiter will send you the current schedule and registration link. Register before the deadline: onsite and offsite exams can't be cancelled or moved after it.

LINKS **Brighter Learning Hub login**

Next → Start reviewing while you wait for exam day.

5 Review with mock exams

Practise until you feel ready. Re-watch the videos and read the reviewer PDFs your recruiter sends you.

LINKS **IIAP mock exam** · **Traditional mock exam** · **VUL mock exam**

Next → Take your exam on your scheduled date.

6 Take the licensing exam

Take your IC or IIAP exam on your scheduled date.

- **IIAP online:** you'll get a verification code by email within 24 hours of payment. It's valid for 7 days. Once you open the exam, finish it within 1 hour.
- **Onsite or offsite:** your recruiter gets your batch and time 1–2 days before the exam.
- **Results:** Sun Life receives them within about 5 working days, and your recruiter will let you know.

Next → Once you pass, watch for your eRecruitment invite.

STAGE 3

Complete your application

Set up your profile, submit your documents and start training.

7 eRecruitment invite

Your recruiter sends you an invite to the eRecruitment Portal.

- Open the invite within **24 hours**. After that the link expires and your recruiter will need to send a new one.
- Fill in your candidate profile completely.

LINKS **Advisor Candidate Guide**

Next → Upload your requirements.

8 Submit your requirements

Upload your documents in the LiveBrighter Portal (LBP). Your recruiter checks each file before it moves forward.

- Use the checklist on the requirements page of this guide.
- Every file should be a clear PDF with no background, folds or objects in the scan. Save your photo as .jpg.

Next → Watch your email for the Code of Conduct.

9 Code of Conduct

You'll receive the Sun Life Code of Conduct by email.

- Read it and reply **"I Agree"**. Your reply is required before you can be coded.

Next → Start Headstart.

10 Headstart training

Your first training as a new advisor.

- Complete Headstart before coding.

LINKS **Headstart guide**

Next → Your recruiter sends your files to Licensing.

STAGE 4

Become an advisor

The final stretch: your license, your contract and your advisor code.

11 Licensing

Your recruiter sends your files to Sun Life Licensing.

- Keep your original notarized CA form. The hard copy goes to Licensing after your license is released and you sign your contract. This is an Insurance Commission requirement, and missing it can cancel your license.

Next → Sign your contract.

12 Contract signing

Sign your advisor contract.

- Your contract kit is sent to your Sun Life email.

LINKS **Contracting Session guide**

Next → Your recruiter requests your advisor code.

13 Coding

Your recruiter requests your advisor code.

- There's nothing for you to send. Your "I Agree" reply from Step 9 goes with the request.

Next → Welcome to the team!

14 Welcome to Neem Tree

You're officially a Sun Life advisor.

- Before coding, send your recruiter a photo for your welcome post.
- After coding, you'll be added to the Neem Tree Facebook group and team chat.

Your requirements checklist

Tick each one off as you upload it to the LiveBrighter Portal. Your recruiter will tell you if any extra documents apply to you, such as a permit to sell for government employees or a clearance from a previous insurer.

	Document
☐	**Certificate of Authority (CA) form** Life and/or Variable. Handwritten and signed by you *before* notarization. Notarized within 5 months of submission, with a ₱15 documentary stamp on page 3. Upload a colored scan.
☐	**Proof of license fee** ₱1,515 per license to BPI 0993-0156-79, Sun Life of Canada (Philippines), Inc. Add the note "License Fee for (your name)". The screenshot must say "Successfully Transferred" or "Processed".
☐	**Income Tax Return** Latest BIR 1700, 1701, 1702 or 2316, stamped "received" or with the BIR email acknowledgment.
☐	**NBI clearance** Colored, and valid for at least 6 more months.
☐	**Proof of SSS** SSS card, E1, RS-1, online verification or payment slip. **UMID is not accepted.** Use your own SSS number, not your employer's.
☐	**Proof of TIN** TIN card, a BIR document stamped received, a filed ITR, or an online verification screenshot.
☐	**Licensing exam result** Must show the date, place, your name, the result and the type (Life or Variable).
☐	**Insurance Concept and SLTC certificates** From Steps 2 and 3. Valid for one year.
☐	**1x1 photo** Yellow background, business attire, saved as .jpg.
☐	**Medical information** If you're 39 or younger: full details for every "Yes" answer.
☐	**Proof of employment** Company ID or certificate of employment. Business owners: Mayor's permit, DTI or BIR registration. If you left a job in the last 3 years: your clearance.

> **Avoid these common mistakes:** "payment in process" screenshots, UMID as SSS proof, notarization older than 5 months, changes made after notarization, expired NBI or certificates, and scans with backgrounds or folds.
> **Keep your details the same everywhere:** your name, TIN, SSS, address, birthplace, birthdate, employer, mobile number and email must match across your LBP profile, CA form and every document.

Fees and support

Fee	Amount
IIAP exam, onsite or offsite	₱1,000
IIAP exam, online	₱1,300
IC exam (Traditional or Variable)	₱1,010 per license
IC license application	₱1,515 per license

Need help with fees? Life Line Plus

- Sun Life can pay your exam and license fees first, so you can keep moving.
- Your recruiter registers you for it.
- The full amount is deducted from salary in the 3rd month after the month you register. Settle it with your recruiter.

Questions?

- Message your recruiter. That's what they're there for.
- Brighter Learning Hub login problems: **phil.elearning@sunlife.com**

Quick links

Scan with your phone, or tap if you're reading this on screen.

Simulated Exam & SLTC

Brighter Learning Hub

Review video Part 1

Password:

sl_brightbox

IIAP mock exam

Traditional mock exam

VUL mock exam

We're glad you're here.

Take it one step at a time. Your team is with you the whole way.

The review video password is for advisor candidates only. Please don't post it publicly.