

End-of-life planning and support with Wellthy

With Sun Life's Basic and Voluntary Life insurance, employees can plan proactively or get help in the moment with end-of-life support from our partner, Wellthy.¹ Available for Life Clients with 1/1/26 and later effective dates.

Wellthy provides personalized, comprehensive care coordination services and resources for individuals, caregivers and beneficiaries by guiding them through the end-of-life journey—whether they're proactively planning to organize their estate or seeking guidance through grief and loss.



Unsupported grief costs companies as much as **\$225.8** billion annually.²

Helping at every stage in the journey

Planning for the future

- Shares resources for preparing a will, advanced directive, healthcare power of attorney, documenting end-of-life wishes
- Finds estate attorneys and other legal resources
- Provides guidance on having difficult conversations with loved ones

Navigating care during end of life

- Finds care services such as hospice, palliative care, doulas
- Schedules and tracks medical appointments
- Explores and arranges respite care for caregivers
- Works with insurance providers to verify coverage for comfort care needs

Managing a loss

- Evaluates funeral and burial options
- Supports with identifying/resolving outstanding bills, insurance claims
- Explores resources for closing accounts and managing digital assets
- Navigates survivor benefits through U.S. Social Security, the VA, employer unions

Providing support following a loss

- Locates bereavement support
- Shares resources and advice for coping, self-care, and emotional well-being
- Coordinates meal and grocery delivery for grieving families

About Wellthy's Care Coordinators

- Each has a minimum of 5 years of professional experience, with nearly 50% having a Masters' degree or higher
- Experience in social work, medical and nursing, mental and behavioral health, childcare, patient advocacy, aging
- Nearly 20 languages spoken across the team

How Wellthy works

One-on-one, personalized support. Each person/family is paired with a Care Coordinator who provides guidance and support to help complete tasks, find and assess legal resources, schedule appointments and much more.

Digital, self-led support. Through Wellthy's secure portal, members have access to care planning tools and resources in one centralized, accessible place.



Care circle

Connects a person's entire care network in one secure place, so everyone can stay informed

Care plans

Digital tools that help organize to-do lists, securely store information

Messaging

Convenient communication with the Wellthy care team

Educational resources

Personalized content based on where a person is on their journey

Wellthy community

A peer-to-peer support group

Contact your Sun Life representative to learn more.

1. Not available in New York or Vermont.

2. "What is grief?" retrieved March 2025 from https://workplacementalhealth.org/mental-health-topics/grief#section_3

Value-added services are not insurance, are offered only on specific lines of coverage, and carries a separate charge, which is added to the cost of the insurance. The cost is included in the total amount billed. Wellthy is provided by Wellthy, Inc. The entities that provide the value-added services are not subcontractors of Sun Life and Sun Life is not responsible or liable for the care, services, or advice provided by them. Sun Life reserves the right to discontinue these Services at any time. Employers who provide group insurance coverage and make available this Service within an I.R.C. Section 125 cafeteria plan should consult a tax professional to determine whether those services are Qualified Benefits for Section 125 plans.

Group life 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, 12-GP-01, 15-GP-01, 15-LF-C-01, 12-GPPort-P-01, 15-LFPort-C-01, 15-ADD-C-01, 13-ADD-C-01 and 13-ADDP-C-01. Product offerings may not be available in all states and may vary depending on state laws and regulations.

© 2025 Sun Life Assurance Company of Canada, Wellesley Hills, MA 02481. All rights reserved. The Sun Life name and logo are registered trademarks of Sun Life Assurance Company of Canada. Visit us at www.sunlife.com/us.

VASFL-10751-c

#1658051716 05/25 (exp. 05/27)