



DIOCESE OF SACRAMENTO

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LAY PERSONNEL

June 12, 2023

To: Pastors, Parochial Administrators, Parish Stewards, Agency Directors, Office Managers, and School Principals

FR: Rosa Miramontes

RE: SunLife Conversion and Portability Comparison / SunLife Conversion

SunLife has provided an update to the forms that we are required to provide an employee at the time of separation pertaining to supplemental life insurance. There are now two different forms available. Each employee should only receive one form that appropriately applies to their circumstances.

The *Life Conversion and Portability Form* is to be provided to an employee when one of the following apply:

- Employee is NOT Retiring or
- 69 years of age or younger or
- Employee is NOT Disable

For your ease the link to the Life Conversion and Portability Form (GLFM-9018) has been provided below:

<https://www.scd.org/sites/default/files/2023-04/Life%20Portability%20and%20Conversion%20Comparison%2012020.pdf>

The *Life Conversion Eligibility Form* is to be provided to an employee when one of the following apply:

- Employee is Retiring or
- 70 years of age or older or
- Employee is Disable

For your ease the link to the Life Conversion Eligibility Form (GLFM-9073) has been provided below:

<https://www.scd.org/sites/default/files/2023-06/Life-Conversion-Notice-June-2023.pdf>

Note: The PT690 Separation Checklist has been updated to reflect these changes. For your ease the link to the update PT690 Separation Checklist has been provided below:

<https://www.scd.org/sites/default/files/2023-06/PT690%20-%20Separation%20Checklist%20-%205.2023%20%28002%29.pdf>

Please feel free to contact the office of Lay Personnel with any questions or concerns at 916-733-0239 or benefits@scd.org.