

ONLINE ENROLMENT BROCHURE



Enrol online; it's quick and easy!

With menus that simplify navigation, up-to-date content and improved functionality, enrolling in and managing your account online has never been easier.



1 Register for an access ID and password

- Go to **mysunlife.ca**.
- Select **Register**.

Sun Life Financial my Sun Life FIND AN ADVISOR GET A QUOTE LEARN & PLAN Français

CUSTOMER SIGN IN

Remember me

Password

Sign in **Register**

Sign-in help

Plan sponsors and advisors

By signing in, you agree to these [terms and conditions](#).

SIGN-IN HELP

My Sign-in/Access ID is suspended.

Grow your money faster
See how just a small difference in management fees can help you save more!

Learn more

Common support questions

3 Sign in and preferences

- Complete your sign-in information and contact preferences.

Sun Life Financial

Sign in and preferences

Sign-in information

Email

Use this email to sign in

Password

Confirm password

8 to 10 characters
1 number (minimum)
1 letter (minimum)
No spaces
No special characters
Passwords match

We'll use your email in accordance with our [privacy policy](#) including for messages, like account and password help, claim notifications and some statement notifications. You can update your contact preferences after you sign in.

Sun Life Financial

Sign in and preferences

Sign-in information complete

Contact preferences

Type Phone (555-555-5555) Preferred call time

Cell (Optional)

North American phone numbers only.

2 Welcome

- Register using your Group Retirement Services plan information.
- Fill out the online form to complete registration. You can use the last three digits of your social insurance number to confirm your identity. Alternatively, Sun Life can send you a letter or email.

Sun Life Financial

Welcome!

If you have any information from us, your employer or advisor, you'll want to have that handy.

Finding your file...

Date of birth (DD-MMM-YYYY)

Country of residence

Postal code

Select a product that you have

Employer investments and savings

Health/ dental benefits

Products purchased through an advisor

Sun Life Financial

Welcome!

If you have any information from us, your employer or advisor, you'll want to have that handy.

We've found your file.

An extra step for security.

This site contains information about your health and/or finances so we take an extra security step to protect you.

4 You're all set!

- You now have the information you need to sign in.

Sun Life Financial

You're all set!

You can use this information to sign in:

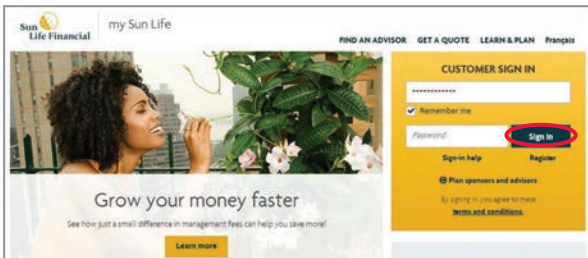
Email: Mary.Smith@MyCompany.com

or

Access ID: 0000000000000000

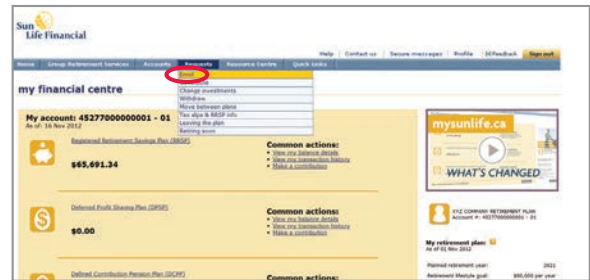
1 Getting started

- Go to **mysunlife.ca**.
- Enter your sign in/access ID and password.
- Select **Sign in**.
- Select **my financial centre**.



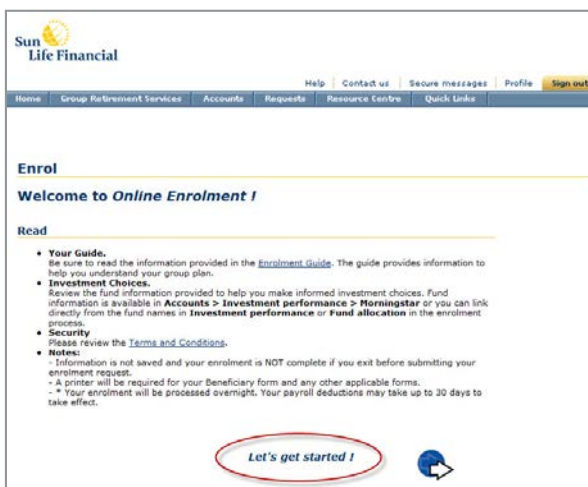
2 My financial centre

- Select **Enrol** under the **Requests** drop-down menu.



3 Getting started

- Read the information about enrolment and make sure you understand the terms and conditions of Sun Life Financial's Plan Member Services website.
- Select **Let's get started!** to begin.



4 Adding a plan

- Check the box corresponding to the plan in which you want to enrol
- Select **Save and Continue**.

Sun Life Financial

Help | Contact us | Secure messages | Profile | Sign out

Home | Group Retirement Services | Accounts | Requests | Resource Centre | Quick Links

Enrol

[Enrolment Guide](#) | [Plan Selection](#)

Current Plans

The following is a list of plan(s) in which you have already been enrolled:

Defined Contribution Pension Plan (DCPP2)

Add a Plan

Based on our current records you are eligible to participate in the plan(s) indicated below. Please notify your employer of any changes to your personal records.

Select the plans in which you would like to enrol by checking the box. Plans which are already checked have been designated by your employer and you must complete the enrolment process.

Savings Account (SAV)

Tax Free Savings Account (TFSA)

Stock Ownership - Registered (RRSPs)

Group RRSP Account (RRSP)

Stock Ownership - Non-Registered (EPSP)

Spousal Registered Retirement Savings Plan (RRSPS)

Your employer may be making contributions on your behalf. For more details, please see your plan guide.

Save and Continue

5 Determine your comfort level with risk

Complete the **Asset allocation tool** to determine the level of diversification and risk that's right for you.

- If the tool does not open automatically, you can complete it under the **Resource Centre** drop-down menu by selecting **my money tools**.
- Select **Continue** to get started.

Sun Life Financial

Help | Contact us | Secure messages | Profile | Sign out

Home | Group Retirement Services | Accounts | Requests | Resource Centre | Quick Links

my money tools

[Asset allocation](#) | [Retirement Planner](#) | [Tools](#)

Do you have more than one savings goal?

Identifying what you'll be using your money for is important. Think about your objective for the money in this plan *.

If you have more than one plan, you may have a different objective for each plan. For example, in a non-registered plan you may have a short-term goal of saving for a down payment on a home, while in a registered retirement plan you may have the long-term goal of saving for your retirement dream.

Select a plan: Defined Contribution Pension Plan (DCPP2)

*Pension legislation requires that the money in a defined contribution (DC) pension plan is locked-in for retirement purposes. At retirement, this money can only be used to purchase a retirement income product (e.g. life income fund). The money from a savings and share ownership plan is not subject to pension legislation and, depending on your plan objectives and rules, can be used towards retirement or any other objective. See your plan rules for more details.

Asset allocation disclaimer

This tool is intended as a general guideline for investment purposes. It is built using assumptions based on historical investment performance which are not guaranteed. Market conditions, the value of one or more asset classes and other factors will change over time. Past performance does not guarantee future results. This tool is designed only for the assets in your group plans at Sun Life Financial. You may want to adjust the results based on any additional assets, savings and spending needs. Consult with a professional financial advisor for advice specific to your personal situation.

Continue

6 Select your funds

- Under the **Accounts** drop-down menu, select **Investment performance** to learn more about your investment options.
- Indicate how you wish to allocate your contributions and your employer's contributions (if applicable) by assigning a percentage to the investment options you have selected.
- You must complete this step for each plan you want to enrol in.
- Select **Save and Continue**

The screenshot shows a web interface for selecting funds. At the top, there are four colored squares (red, yellow, blue, green) and a 'Balanced' dropdown menu. Below this, there are three sections of fund selection tables, each with 'Fund Name', 'Member Allocation', and 'Employer Allocation' columns.

Fund Name	Member Allocation	Employer Allocation
Fidelity ClearPath Income	0 %	0 %
Fidelity Cdn Alloc Fund	0 %	0 %
Fidelity Cdn Balanced	0 %	0 %

Fund Name	Member Allocation	Employer Allocation
Fidelity ClearPath 2015	0 %	0 %
Fidelity ClearPath 2020	0 %	0 %
Fidelity ClearPath 2025	0 %	0 %
Fidelity ClearPath 2030	0 %	0 %
Fidelity ClearPath 2035	0 %	0 %
Fidelity ClearPath 2040	0 %	0 %
Fidelity ClearPath 2045	0 %	0 %

Total Percent Allocated	Member Allocation	Employer Allocation
Build your own option		
Asset Class		
Cash & equivalents	0 %	0 %
Fixed income	0 %	0 %
Canadian equity	0 %	0 %
U.S. equity	0 %	0 %
International equity	0 %	0 %
Foreign/global equity	0 %	0 %
Balanced	0 %	0 %
Target date (Lifecycle) funds	0 %	0 %
Total percent allocated :	0 %	0 %

7 Review and submit

Your enrolment is not complete and information is not saved if you exit before you select **Submit**. Remember: Once you select **Submit**, you will not be able to go back.

- If you wish to make changes, select one of the tabs under **Enrol**. If you select one of the tabs, you will have to select **Save and Continue** again, even if you do not make any changes.
- Select **Enrolment summary** to review your information and then print a copy for your files.
- Select **Submit**.

The screenshot shows the 'Enrol' page with a navigation bar at the top containing 'Home', 'Group Retirement Services', 'Accounts', 'Requests', 'Resource Centre', and 'Quick Links'. The 'Enrol' section has several tabs: 'Enrolment Guide', 'Plan Selection', 'Sponsor's Info', 'Fund Allocation', and 'Review & Submit'. The 'Review & Submit' tab is active.

Enrolment checklist
The below checklist outlines the remaining steps necessary to complete your enrolment.

Enrolment checklist

- Provide enrolment information
- Review, verify and print your **enrolment summary**.
- Select **Submit**

Submit your enrolment request

Review and verify your **enrolment summary** to ensure the information you have provided is correct. You can print or save the summary by selecting the **File** menu and then **Print** in your internet browser.

If you need to make changes, select one of the previous steps using the buttons at the top of the page. If you return to a previous step, you will be required to select **Save and continue** even if you have not made any changes in order to complete your enrolment.

Remember: Your enrolment is not complete and information is not saved if you exit before you select **Submit**.

Acknowledgement

By submitting this application I confirm that I:

- Have read and fully understand the information provided in the **enrolment guide**.
- Authorize Sun Life Assurance Company of Canada, its agents and service providers, to obtain, use and transmit to my Plan Sponsor, its agents and service providers, my personal information for the purpose of plan administration.
- Authorize Sun Life Assurance Company of Canada, its agents and service providers, to transmit my personal information to the advisor appointed by my Plan Sponsor, if any, or to my personal advisor for the purpose of enabling in-plan advisory services.

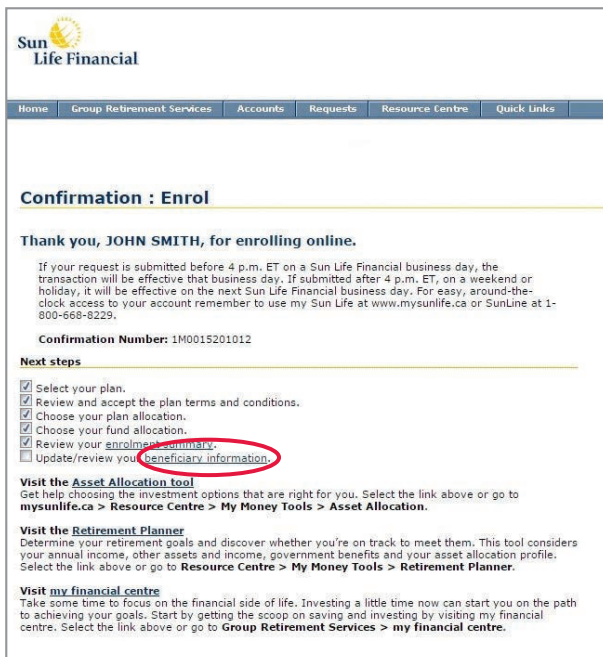
Submit

8

Designate your beneficiary

Designate a beneficiary to ensure the assets in your account are distributed according to your wishes in the event of your death. If you do not designate a beneficiary, the assets in your account will be paid out according to legislative requirements.

- Select **beneficiary information** and follow the on-screen instructions.



Sun Life Financial

Home | Group Retirement Services | Accounts | Requests | Resource Centre | Quick Links

Confirmation : Enrol

Thank you, JOHN SMITH, for enrolling online.

If your request is submitted before 4 p.m. ET on a Sun Life Financial business day, the transaction will be effective that business day. If submitted after 4 p.m. ET, on a weekend or holiday, it will be effective on the next Sun Life Financial business day. For easy, around-the-clock access to your account remember to use my Sun Life at www.mysunlife.ca or SunLine at 1-800-668-8229.

Confirmation Number: 1M0015201012

Next steps

- Select your plan.
- Review and accept the plan terms and conditions.
- Choose your plan allocation.
- Choose your fund allocation.
- Review your enrolment summary.
- Update/review your **beneficiary information**.

Visit the Asset Allocation tool
Get help choosing the investment options that are right for you. Select the link above or go to mysunlife.ca > **Resource Centre** > **My Money Tools** > **Asset Allocation**.

Visit the Retirement Planner
Determine your retirement goals and discover whether you're on track to meet them. This tool considers your annual income, other assets and income, government benefits and your asset allocation profile. Select the link above or go to **Resource Centre** > **My Money Tools** > **Retirement Planner**.

Visit my financial centre
Take some time to focus on the financial side of life. Investing a little time now can start you on the path to achieving your goals. Start by getting the scoop on saving and investing by visiting my financial centre. Select the link above or go to **Group Retirement Services** > **my financial centre**.

The screen shots provided in this document are for illustrative purposes only. They may not represent your actual online experience.

C

MANAGING YOUR ACCOUNT **ONLINE**

mysunlife.ca has all you need to stay connected to your savings and grow them for the future. Through your plan at Sun Life Financial, you have access to a series of **online planning tools** that can help you create a financial plan.

Online retirement planning tools:

- money UP! – a game-inspired approach to learning about your plan and investing.
- Retirement planner
- Asset allocation tool
- Pre-retirement calculators
- Videos to help you determine if you're on track, make decisions, and understand your income needs, government benefits and retirement income products.
- Also, before you sign in to your personal account, there are plenty of informative articles on money, health and family, including a section devoted to retirement topics. Simply go to **mysunlife.ca** and look under the **Learn & Plan** drop-down menu.



Questions?

The Customer Care Centre and Automated Telephone System are available to help you.

If you have any questions, or you need help accessing your account or using these tools, one of Sun Life Financial's Customer Care Centre representatives can help when you call **1-866-896-6976** any business day from 8 a.m. to 8 p.m. ET. You can also use this number to connect to the Automated Telephone System 24-hours-a-day, seven-days-a-week.

Know your responsibilities

You're responsible for making investment decisions and for using the tools and information that have been provided to help you make these decisions. You should also decide if seeking investment advice from a qualified individual makes sense for you.