# ONLINE ENROLMENT BROCHURE

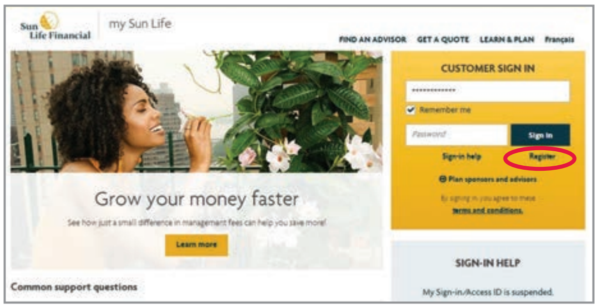
Enrol online; it's quick and easy!

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

# A ONLINE **ENROLMENT**

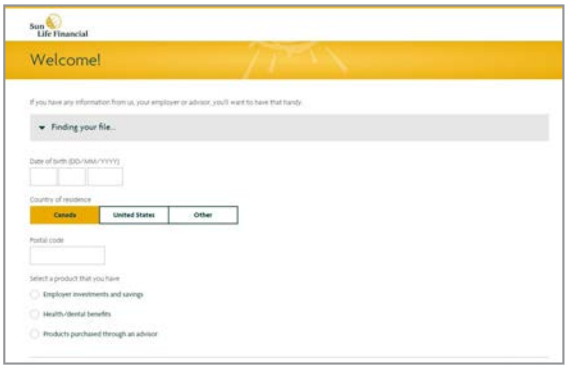
## 1 Register for an access ID and password

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




## 2 Welcome

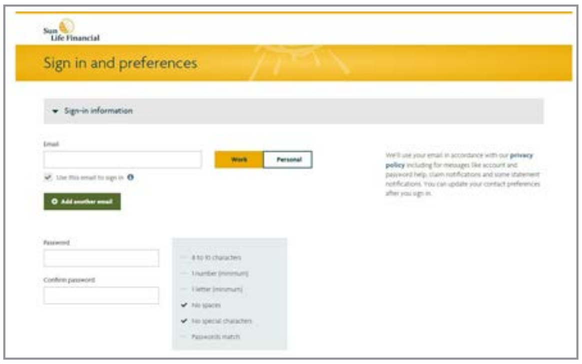
- Register using your Group Retirement Services plan information.
- Fill out the online form to complete registration. You can use the last three digits of your social insurance number to confirm your identity. Alternatively, Sun Life can send you a letter or email.

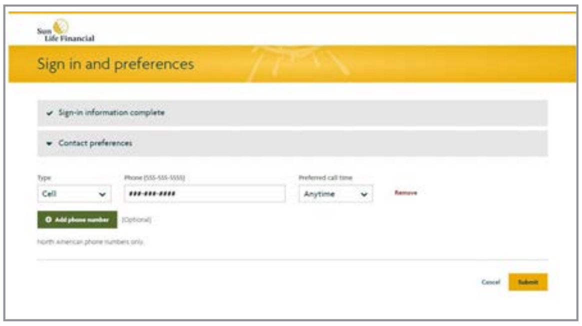




## 3 Sign in and preferences

- Complete your sign-in information and contact preferences.



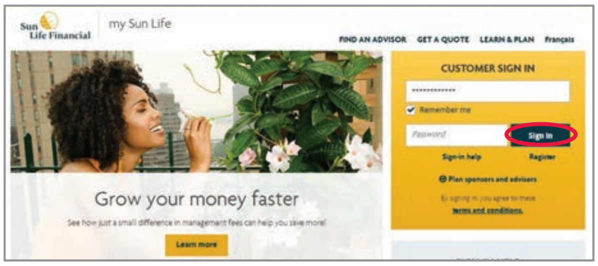

## 4 You're all set!

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

# B ENROLLING IN **YOUR COMPANY PLAN**

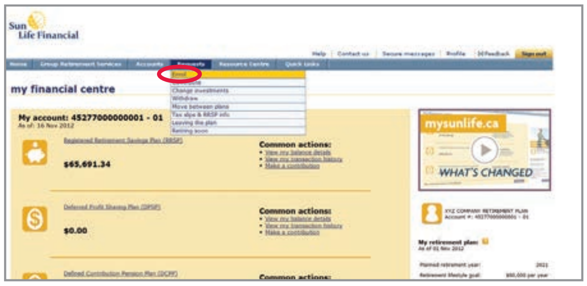
## 1 Getting started

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



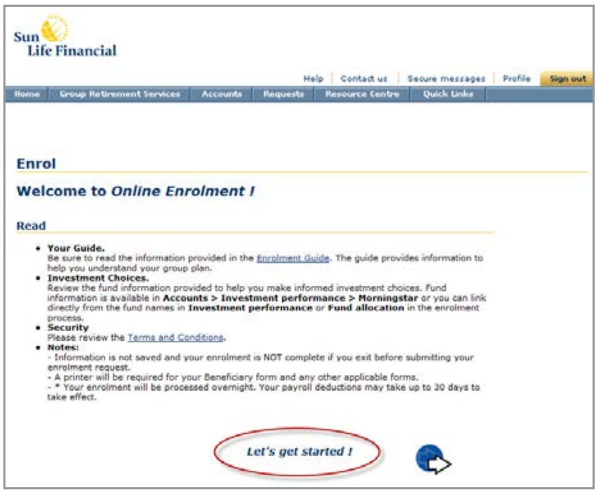

## 2 My financial centre

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



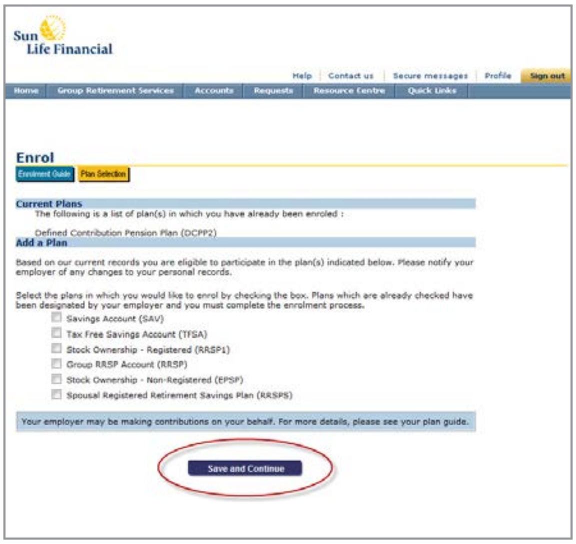

## 3 Getting started

- 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

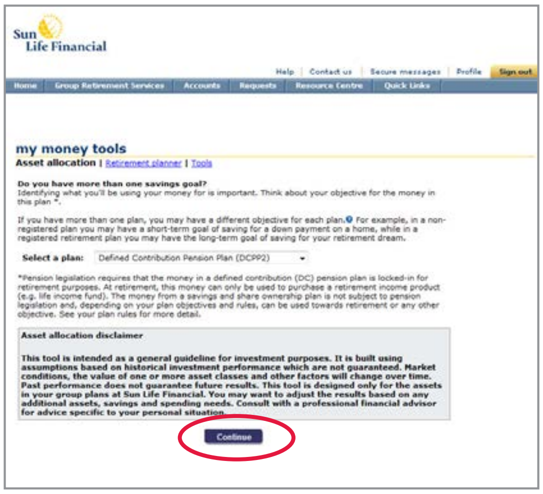
- Check the box corresponding to the plan in which you want to enrol
- Select **Save and Continue**.




## 5 Determine your comfort level with risk

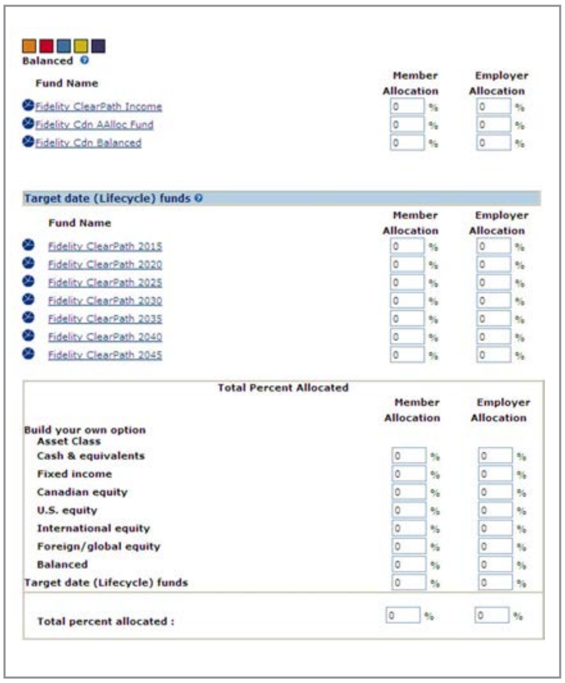
Complete the **Asset allocation tool** to determine the level of diversification and risk that's right for you.

- 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.



## 6 Select your funds

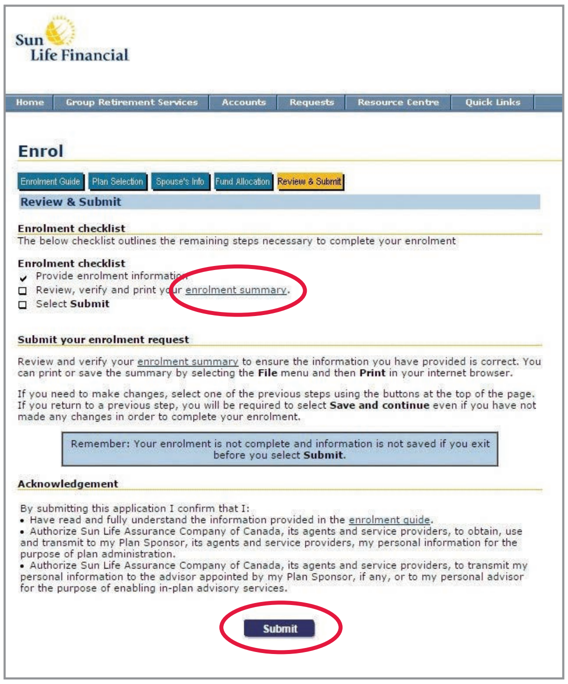
- Under the **Accounts** drop-down menu, select **Investment performance** to learn more about your investment options.
- Indicate how you wish to allocate your contributions and your employer's contributions (if applicable) by assigning a percentage to the investment options you have selected.
- You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




## 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.

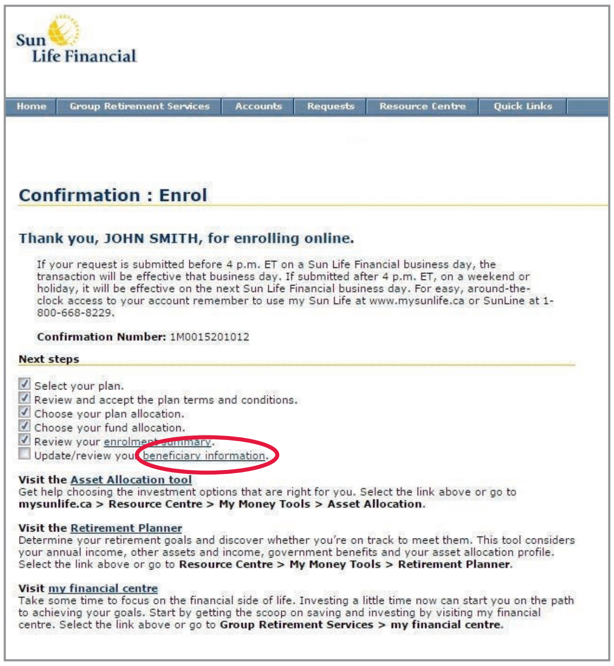
- If you wish to make changes, select one of the tabs under **Enrol**. If you select one of the tabs, you will have to select **Save and Continue** again, even if you do not make any changes.
- Select **Enrolment summary** to review your information and then print a copy for your files.
- Select **Submit**.



## 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**

- [x] Select your plan.
- [x] Review and accept the plan terms and conditions.
- [x] Choose your plan allocation.
- [x] Choose your fund allocation.
- [x] 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.