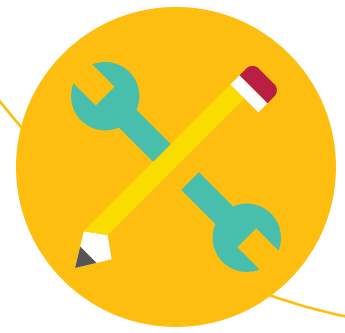


Your money, your tools – visit **mysunlife.ca** and get familiar with your workplace plan.



No matter what career stage you're in, it's never too early to save or plan for your retirement. With **mysunlife.ca**, we provide you with the investing tools, services and information that can help you save. These resources will help you build a savings plan that's right for you.

To explore our tools:

- Visit **mysunlife.ca** and sign in using your sign-in ID and password.*
- Once signed in, select **my financial centre**.

If you don't remember your sign-in ID and/or password, go to **mysunlife.ca and select the appropriate link under **Sign-in help**.*

Decide what type of investor you are

Understand your investment personality by completing the **Asset allocation tool**. It can help you find out how much investment risk you're willing to take on, and help you choose the right funds. Once on **my financial centre**, select **Quick Links > my money tools > Asset allocation**.

See how your funds are doing

Review the full list of funds available in your plan, review their historical performance, see how each fund's invested and review the fees you pay.

- **To review your current investments** and see how you're investing, select **my financial centre > Accounts > Personal rates of return > Details**.
- **To review each fund's performance** on our investment platform, select **my financial centre > Accounts > Investment performance**. This information is provided by **Morningstar®**, a leading provider of investment news and analysis.
- **To review each fund's fund management fees (FMs)**, select **my financial centre > Accounts > Account fees**.

Know your retirement goal

Determine how much money you'll need to retire with our **Retirement planner**. It'll suggest a retirement lifestyle based on the information you entered about your current income, additional savings, and your comfort with investment risk. The information you enter will be saved each time you visit the planner. That helps you track your progress towards your desired retirement lifestyle.

To access the **Retirement planner**, select **my financial centre > Quick Links > my money tools > Retirement planner**.

Make changes to your investments*

Updating your investments is easy. Select **my financial centre > Requests > Change Investments**.

** There are no charges for transfers. However, there may be a 2% charge if you make a transfer into a fund followed by a transfer out of the same fund within 30 calendar days. We don't charge this fee on guaranteed and money market fund transactions.*

Life's brighter under the sun



Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies.

© Sun Life Assurance Company of Canada, 2021.



Check your beneficiary information

We know you want it to be quick and hassle-free for those who matter most to get your savings after your death. Choose a beneficiary to make this happen.

You can add/change your beneficiary at any time online, as long as it's revocable. Once on **my financial centre**, select **Quick Links > Beneficiary info**.

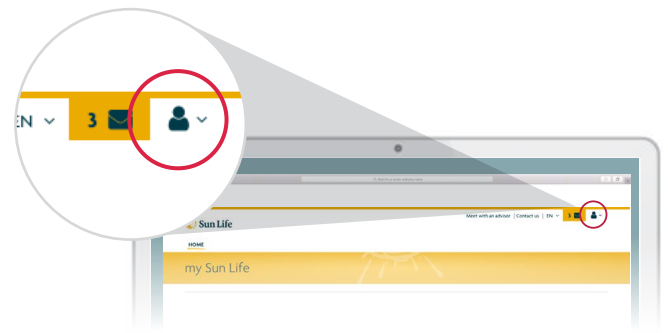
Review your statement

To view your statements online, select **my financial centre > Accounts > Statements**.

Go paperless and make sure your profile is up to date

Review your account profile, and change your paperless settings for all your Sun Life tax slips, receipts and account statements.

Sign in to **mysunlife.ca**, select the profile icon in the top-right corner > **Personal information > Contact information** or **Preferences** (for going paperless).



We're here to help



Go mobile: Check your balances and see how your funds are doing. Download the **my Sun Life mobile app** on Google Play or the Apple App Store.



Visit **mysunlife.ca** for tools, articles and videos. Sign in and select **Chat live now** to get live support.



Consider speaking with a financial advisor (registered as a Financial Security Advisor in Quebec) of your choice to get personalized advice about your plan.