Get to know mysunlife.ca and the my Sun Life mobile app

Discover all the tools, information and services available on **mysunlife.ca** and the **my Sun Life mobile app** to help you take care of your workplace retirement savings plan.

It's always a good idea to regularly review your investment mix, financial goals and investment risk tolerance. It's important to make sure you're on track to reach your investment goals. Sign in to **mysunlife.ca** or with the **my Sun Life mobile app** to learn about your workplace plan, and make sure your account's up to date.

If you haven't signed up before, instructions on how to sign up are on page 2.

Which investments are right for you?

Complete the **Asset Allocation** tool to find out how much risk you're willing to take when it comes to investing. This can help you choose the right funds for your investment goals.

- Once signed in, select **Manage plan** then **my plan**. Next, click **Tools** followed by **Asset allocation** and finally **Continue**.

Have you named a beneficiary?

Naming a beneficiary is the best way to make sure your money goes where you want when you're gone. It makes it quicker and hassle-free for your loved ones to receive your money.

- Once signed in to **mysunlife.ca**, select **Manage plan** then **Manage beneficiaries**.

What's your vision of retirement?

Create a plan to meet your retirement goals using the **Retirement planner**. The information you enter will be saved, so you can review it any time to see your progress.

- Select **Manage plan**, followed by **Tools & calculators**, then **Retirement planner.**

How are your funds doing?

See the funds available in your plan, along with their performance info.

- Select **Manage plan** then **my plan**. Next, click **Check on account** followed by **View investment performance**.

What fees do you pay?

See the fees charged for each fund available in your plan. Fees pay for the investment management, recordkeeping and operating costs of the funds.

- Select **Manage plan** then **my plan**. Next, click **Plan overview** followed by **Account fees**.

Review or update your investment instructions

Make sure your contributions are going where you want them to. To make a change:

- Select **Manage plan** then **my plan**. Next, click **Make a change** followed by **Change investments**. You can also update your account by calling us directly.

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.

Sun Life

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.

Online tools, information and services that can help.

How do you set up an account online?

Visit **mysunlife.ca** or open the my Sun Life mobile app and select **Register**. Then follow these steps:

01.	02.	03.
Fill out the online form.	Register with the same email address you gave your employer.	Check for a confirmation email and follow the steps!

If we have your email on file, you'll just need to choose your password and verification questions. That's it! If we don't have your email on file, you can use your banking information to verify your identity.

The easiest way to manage your plan is to download the my Sun Life mobile app.

Easily access articles, videos and additional services to help you manage your money and save more. You'll find:

- Tools and calculators
- Videos and tutorials
- Document submission tools
- Access to help

Update your profile and paperless settings

Select the **Person** icon at the top-right corner of the **Home** page.

We're here to help

Fast, mobile support

Download the **my Sun Life mobile app** on Google Play or the Apple App Store.

Contact us

Head to **sunlife.ca/contact-us**.

And sign in to **mysunlife.ca** for tools, articles and videos. Chat with us online for additional support.

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