

WORKPLACE SAVING TRANSFORMED

Quick and easy financial check-up

Employees intend to get around to making the most of their workplace retirement and savings plan, but often don't. **MAX Review makes it easy for them to take action** with regular reminders and a guided, online process that shows them how to maximize their benefits. Whether it's maximizing a company match, adding a new product, reviewing investments and beneficiaries, or increasing their contribution amounts, **MAX Review keeps your employees actively engaged.**

How does MAX Review work?

MAX Review uses campaigns to help existing employees review their workplace retirement and savings plan accounts and makes it easy to optimize the benefits of participating. The concise, efficient digital experience is designed to encourage action!

MAX Review gives you and your employees:



Annual reviews or periodic campaigns – **flexibility** to meet plan goals



Concise, efficient and personalized member experience designed for optimal results



A fully digital experience, including initial campaign launch email, follow-up emails, and email confirmation upon completion



Data usage to improve **campaign effectiveness** and obtain employer reporting post-campaign



Personalized recommendations and **nudges** to help highlight areas plan members need to review



A campaign which promotes participation and increases retirement readiness

For more information about **MAX Review**, please contact your Sun Life Group Retirement Services representative.

Life's brighter under the sun

