

How to enrol a member

ABOUT ENROL A MEMBER SUBMISSIONS

Enrol a member is an online process that allows you to enrol a member through the Sun Life Financial Plan Sponsor Services website.

What you need to know...

- You are required to enrol only those eligible employees who do not have the opportunity to contribute via payroll deduction to a group RRSP or TFSA, or who are not members of a registered pension plan offered by you.
- To be eligible to participate in the VRSP, employees must:
 - be 18 or over,
 - have at least one year of uninterrupted service,
 - work all or **some** of the time in Quebec or be residents of Quebec.
- You must also enrol any other employee who is not eligible but asks to participate in the plan.
- You have 30 days from the date you joined the Sun Life Financial VRSP (your plan effective date) to enrol your employees.

Before you begin...

PREPARE FOR SUBMISSION

You will need:

1. The member's social insurance number.
2. The member's demographic information (i.e., name, date of birth, language, address, and employment information).

Enrol a member...

There are 5 easy steps required to complete a member's enrolment.

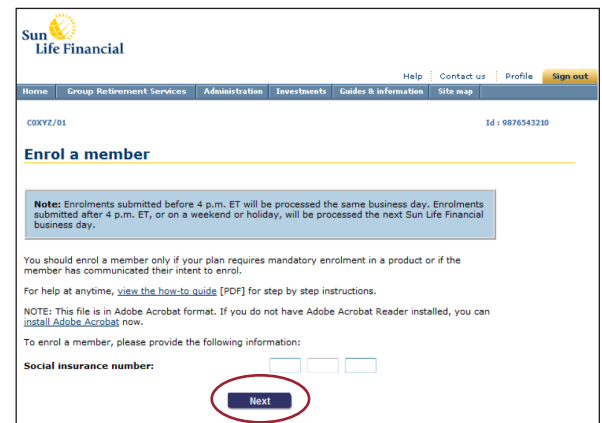
STEP 1: TO GET STARTED

- Sign in to the Plan Sponsor Services website at **www.sunlife.ca/sponsor** using your access ID and password you received in the email from Sun Life.
- On the **Home** page, in the Administration and reporting section, select **Group Retirement Services**.
- If applicable, select a program from the drop-down menu.
- In the top blue navigation bar, select **Administration** and then **Enrol a member**.



STEP 2: BEGIN THE ENROLMENT

- Enter the member's social insurance number.
- Select **Next** to continue.



STEP 3: PROVIDE MEMBER DEMOGRAPHIC INFORMATION

Fill in all of the required demographic information for a member.

- Select **Next** to continue or select **Cancel** to exit without saving information.

NOTE: The **Date of enrolment** can be no earlier than your plan effective date. Following the member’s date of enrolment, we will send them a notice of membership and they will have 60 days from the date that notice is sent to opt out of the plan.

Sun Life Financial

Home | Group Retirement Services | Reports | Administration | Investments | Guides & information | Site map | Help | Contact us | Profile | Sign out

COA2L/01 Id: 1562300001

Enrol a member

* - Indicates required information

Personal info

Social insurance number: 123456789

* First name: (must be legal name)

* Last name:

* Gender: Male Female

* Date of birth: Day Month Year

* Language: (for communications) English French

* Date of employment: Day Month Year

* Payroll account number: 123456789 RP1234

* Subdivision:

* Province of employment:

* Date of enrolment: Day Month Year

Current address:

* Country:

* Address line 1:

Address line 2:

Address line 3:

* City:

* Province:

* Postal Code:

Email address:

Phone number (day): ext.

Phone number (evening):

Previous **Next** Cancel

You are on a Sun Life Financial website. Please refer to the legal, privacy and security pages for information on the use of this site. Any changes you make on this site may affect information about your particular plan offered by Sun Life & Genera Company of Canada.

STEP 4: REVIEW & SUBMIT

- Review and verify that the enrolment information provided is correct.

NOTE: The Sun Life Target Date Segregated Funds will be the default investment option for plan members enrolled in the plan. For their convenience, the member will be enrolled in the Sun Life Target Date fund with the maturity date occurring just prior to their 65th birthday. These funds are provided as a temporary investment at enrolment and members are encouraged to assess the investment options based on their risk profile or target retirement date.

- If needed, select **Edit** to make changes to any personal information you have entered. (*NOTE:* You’ll be asked to go through the subsequent pages again but the information previously entered will be retained. Just click on the **Next** buttons to return to the **Review & submit** page.)
- Select **Submit** to send your enrolment request or select **Cancel** to exit without saving information.

Sun Life Financial

Home | Group Retirement Services | Administration | Investments | Guides & information | Site map | Help | Contact us | Profile | Sign out

CO379/01 Id: 0037900001

Enrol a member

Review & submit

Checklist

- Provide enrolment information
- Review and verify the enrolment information provided
- Use the **Edit** button to make any required changes
- Select **Submit**
- Print the Confirmation page

Reminder: You must select Submit to complete the enrolment and save the information.

Personal info

First name: Robert

Last name: Samson

Gender: Male

Date of birth: 01 Jan 1970

Language: English

Social insurance number: 123456789

Email address: robertsamson@email.com
(members will be sent an email to confirm their email address)

Phone number (day): 416-555-5555

Phone number (evening): 416-222-2222

Current Address: 225 King Street
Toronto ON
M5V3C5

Date of employment: 01 May 2013

Payroll account number: 123456789 RP1234

Subdivision: 001 - 001 - sub 001

Province of employment: Ontario

Date of enrolment: 01 Jun 2013

Plan name

Plan name	Default fund*	Member contribution
Voluntary Retirement Savings Plan (VRSP) Contract number: 25623	Member: Sun Life Financial Granite TM Target Date Funds	3.00%

*100% of the contributions for each plan will be invested in the indicated default funds.

Submit Cancel

STEP 5: PRINT CONFIRMATION PAGE

- This page confirms the information that you submitted including the date and time of your submission.
- Print the employer confirmation by clicking on the appropriate link.

Sun Life Financial will send a notice of membership to your employee(s) after their date of enrolment. An enrolled employee has 60 days from the date the notice of membership is sent to decide if they would like to opt out of the plan. You must begin collecting participating members' contributions from their salary and remitting them to the VRSP as of the first pay that follows the sixty-first day after the notice of membership is sent.

The screenshot displays the Sun Life Financial website interface. The main content area shows a confirmation page with the following details:

- Confirmation**
- Thank you for enrolling in Testing Client.
- Enrolment submitted:** 16 May 2010
- Confirmation number:** 2538162
- Print employer confirmation - print
- Personal info**
- First name: Rob
- Last name: San
- Gender: Male
- Date of birth: 01 Jun 1975
- Language: English
- Social insurance number: 123-456789
- Email address: rob@testing.com
- Phone number (day): 416-225-1234
- Phone number (evening): 416-225-1234
- Current Address: Toronto, Ontario
- Date of employment: 16 May 2010
- Payroll account number: 123456789
- Subdivision: 1234
- Province of employment: Ontario
- Date of enrolment: 16 May 2010

Below the personal info, there is a table with the following data:

Plan name	Default fund*	Member contribution
Voluntary Retirement Savings Plan (VRSP) Contract number: 25623	Member: Sun Life Financial Granite TM Target Date Funds	3.00%

*100% of the contributions for each plan will be invested in the indicated default funds.

At the bottom of the page, there is a button labeled "Enrol a new member".

Overlaid on the page is a Windows Internet Explorer print dialog box. The print dialog shows the following information:

- Print dialog box with "Print" and "Cancel" buttons.
- Print Range: All
- Page Range: 1 of 1
- Number of copies: 1
- Collate:
- Print to file:
- Find Printer... button

Questions?

If you have any questions or need additional support enrolling a member, you can speak with a representative from the Small Business Centre at **1-855-362-3086** from 8 A.M. to 6 P.M., ET any business day.