



**Sun Life Assurance
Company of Canada**

Group Retirement Services
Attn: Administrative Unit G
PO Box 2025 Stn Waterloo
Waterloo ON N2J 0B4

[First name] [Last name]
[Address]
[City] [Province] [Postal Code]
[Address 3]
[Address 4]

Account number: [Account #]

Dear [First Name],

Following a recent change in job status, we've automatically transferred your savings to a personal account with Group Choices. You don't need to take any action — your funds remain safe and secure with Sun Life.

Group Choices is our exclusive program, available to plan members who are no longer part of a Sun Life administered workplace plan.

Your Sun Life Group Choices benefits:

- **Simplified decisions:** Achieve your financial goals with ease. Our tools and resources make it simple to adjust your plan as your needs evolve.
- **Exclusive solutions:** Access competitive wealth, insurance, and health solutions designed to support you at every stage of life.
- **Help when you need it:** Get advice through a team of Sun Life financial services consultants¹ and retirement consultants, or from an advisor.² Digital tools are available through mysunlife.ca if you want to manage your account on your own.

You can access your account at any time through mysunlife.ca or the **my Sun Life mobile app**. If you're already registered, your email/access ID and password remain the same.

We're here to help – Call us Monday to Friday, 8 a.m. to 8 p.m. ET.

1-877-805-9303 - For investment advice, or to create a financial roadmap, transfer in money held elsewhere, make a contribution, or replace your workplace insurance.

1-866-733-8612 - For general inquiries or to change your personal information.

Visit sunlife.ca/choices for helpful information specifically for Group Choices plan members.

Next Steps

- **Confirm your beneficiary.** It's important to review the beneficiary you've listed on your account, if any, and make sure it continues to reflect your preferences. Update your beneficiary information on mysunlife.ca from the My Plan page, select Make a Change, then Manage Beneficiaries.
- **Scan the QR code below to view more information about your new plan.** If you'd prefer a printed information package or would like more details on our additional products and services, please contact us.



Whether you're planning to save, invest, or draw retirement income, we're committed to helping you stay on track with your financial goals.

The team at Sun Life

Looking for other options?

You may have the option to transfer your assets to a Sun Life Annuity or Retirement Income plan, cash out your investments, or transfer them to an individual account at Sun Life or another financial institution. Whatever you prefer, we can help.

Respecting Your Privacy

We collect, use and disclose your personal information to: develop and deliver the right products and services; enhance your experience and manage our business operations; perform underwriting, administration and claims adjudication; protect against fraud, errors or misrepresentations; tell you about other products and services; and meet legal and security obligations. We keep your information confidential and only as long as needed. You can always ask for your information and to correct it if needed. In most cases, you have a right to withdraw your consent, but we may not be able to provide the requested product or service. For more complete information, read our Global Privacy Statement and local policy at sunlife.ca/privacy or call us for a copy.

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.

¹Registered as a financial security advisor in the province of Quebec

²You may have an advisor automatically assigned to you if there was one associated with your former workplace plan, or if you selected to work with one.