



Leaving your workplace plan? Follow these steps.

Paperwork

You'll have to fill out some paperwork to set up a retirement account and start drawing an income. Even if you're not retiring yet, you may still need to complete paperwork to move money out of your workplace plan.¹

Connect with a retirement consultant to discuss your options

To discuss your retirement income options or to set up a retirement income plan with Sun Life, get connected with a retirement consultant (registered as a Financial Security Advisor in Quebec). Call us at **1-866-224-3906 (option 1)** between 8 a.m. and 8 p.m. ET any business day.

Moving money or investing with another financial institution?

To move your money or start investing with another financial institution, you will need to connect with them to discuss your options. Be sure to take your transition package from Sun Life when you are meeting to finalize your choices.







Important reminder!

It takes approximately 8-10 weeks to complete this process.

¹ If you don't let us know what to do with your money, you may automatically move to Sun Life's Group Choices Plan. You'll receive a transition package with more details about this. If your workplace account is a pension plan, nothing will happen until you make an active decision.

Here's what will happen next:

-  Final day at your employer.
-  Final contributions to your employer plan with Sun Life.
-  Within 60 days of your plan membership ending, you'll get a transition package from Sun Life that outlines your options, including retirement income choices.²
-  Finalize decisions and complete paperwork with your Sun Life retirement consultant or other financial institution.

² If applicable. Depending on your age and the type of employer-sponsored plan, retirement income products may not be available.



Life's brighter under the sun

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Our online tools can help.

Changing your employer tool

Our **Changing your employer** tool (if available) makes it easy to move your money when you're leaving your current workplace plan. *Please note, you may not have access to this tool under your workplace plan.*

1. Sign in to mysunlife.ca.
2. Select **Manage Plan** then **my plan**.
3. Under the **Make a change** drop-down menu, select **Grow beyond your employer plan**.
4. Follow the steps.

Retirement planning and saving tools

You may also want to explore some of the retirement planning and saving tools available online.

1. Under the **Manage plan** drop-down menu, select **Tools**.
2. You may be interested in the **Withdrawal calculator**, **Budget calculator** or the **Annuity calculator**.



Thinking about retirement?

Our retirement consultants can help you start your planning, even if you still have a few years to go. Call us at **1-866-224-3906 (option 1)** between 8 a.m. and 8 p.m. ET any business day.



We're here to help

Fast, mobile support

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

Visit us online

Head to sunlife.ca/contact-us.

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