how to connect

easy access to your personal account information

It’s always a good idea to monitor your account to ensure it continues to meet your savings and investment needs.

That’s where we come in. We’ve made tracking your investments and making account changes easy:

**Web site**

**Telephone—calling 1-866-733-8612 gives you access to both:**

Our touch-tone telephone system, 24-hours a day.

**or**
Our Customer Care Centre.
Every business day from 8:00 A.M. to 8:00 P.M. ET.*

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**A necessary step**

To access your account, you will need a personal Access ID and a password. If you do not have this information, sign on to www.sunlife.ca/member and select “Register.” You will need to enter both your account number (you receive this information when you first join your plan) and your date of birth.

**Forgot your Access ID/password?**
If you have already registered and have forgotten your Access ID and/or password, sign on to www.sunlife.ca/member and select “Forgot your Access ID?” and/or “Forgot your password?”.

**Your own card**
For easy reference, detach the wallet card below and write down your Access ID. For security reasons, you should memorize your password or keep it separate from your Access ID.

**Want an extra card?**
You can print a card showing your Access ID from www.sunlife.ca/member. After entering your Access ID and password, click on “Access Info” at the top of the screen.

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**Here is what you can do when you connect**

- Get your fund balances
- Move money between funds*
- Review the most recent unit values/rates
- Sign on to www.sunlife.ca/member and “Take the Tour”
- Update your future investment instructions
- Get detailed fund information and analysis from Morningstar, a leading provider of investment news and evaluation
- Calculate your retirement income needs with online retirement planning tools
- Build an investment strategy online with the asset allocation tool*
- See what’s new with your plan

**Security is important!**

Our Web site uses the most up-to-date security features available to ensure your account information remains confidential. You also have the option of changing your password at any time.

* Please note—each group plan is different, and not all services are available to all plans. To be effective the same business day, transactions must be made before 4:00 P.M. ET via the Internet or using the touch-tone telephone system and 3:00 P.M. ET via the Customer Care Centre.