

# Western University

Sun Life support throughout the member journey



## Client Care Centre:

General inquiries and support



## Senior Education Consultants:

Understanding your workplace plan



## Financial Services Consultants:

Investment Advice & Retirement Planning



## Retirement Consultants:

Converting savings to income

# Western University- navigating support at Sun Life




## Client Care Centre


**WHO supports:** Client Care Representatives

**WHAT type of support:**

- plan details,
- account balance,
- investment transactions,
- withdrawals,
- tax receipts/tax slips on withdrawals,
- password resets,
- beneficiary update,
- navigating the tools and resources available on the Sun Life member site

**HOW to access support:**

 by phone: 1-866-733-8612

 through chat on our member secure site

**WHEN:** from hire to retire, and beyond




## Group Retirement Services Education

**WHO supports:** Senior Education Consultants

**WHAT type of support:**

- maximize the benefits of your workplace plan,
- understand the Western plan design,
- navigating the tools and resources available on the Sun Life member site

**HOW to access support:**

 1:1 in-person Education Campaigns announced by Western and Sun Life

**WHEN:** throughout career until pre-retirement



## Client Solutions Centre

**WHO supports:** Licenced Financial Services Consultants


**WHAT type of support:**

- review and update your investment strategy,
- get financial advice,
- discuss your financial and retirement goals,
- create a plan to help you achieve your goals,
- transfer-in assets from other institutions

**HOW to access support:**

 by phone: 1-866-634-4840 or

 book an appointment online

 virtual consultation via Zoom

**WHEN:** throughout your career until pre-retirement




## Client Solutions Centre

**WHO supports:** Licenced Retirement Consultants

**WHAT type of support:**

- detailed review of your retirement plan,
- discuss strategies to support your retirement goals,
- understand your income options (RRIF/LIF),
- receive income projections for decumulation

**HOW to access support:**

 by phone: 1-866-224-3906

 book an appointment online

 virtual consultation via Zoom

**WHEN:** entering pre-retirement, retirement and beyond

## 360 Plan Advice- *unlock your potential through your Western workplace plan*



You will be supported by a dedicated team of Financial Services Consultant that will help you understand the details of and maximize the benefits of your **Western Pension Plan**



You will receive **personalized financial and investment advice** that is tailored to your needs now, *and for the future* (at no additional cost)



Financial Services Consultants will help you (and your spouse) create a **financial roadmap** focused on **achieving your financial and retirement goals**



**Whenever things in life change**, you can call your Financial Services Consultant to make **updates to your plan**



Book an appointment to get started on your financial journey with Western & Sun Life today



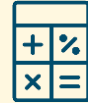
# Sun Life One Plan- seamless transition for tailored retirement support



If you are within 5 years of retirement, our team of Retirement Consultants are here to help you with this important chapter of your journey. Unsure as to how many years remain until retirement? The sooner you call us, the better!



Retirement Consultants are very knowledgeable and familiar with both your Western Pension Plan and details of the Sun Life Retirement & Savings Plan for Western Retirees, which spouses are also eligible to join



You will be walked through different strategies, including a budget for ongoing & planned expenses at retirement in order to best support your retirement goals



A Retirement Consultant will provide you with detailed income projections to support your transition from savings to income



Our Retirement Consultants will continue to support you throughout your retirement



Stay tuned for more details on a return to in-person 1:1 sessions with your dedicated Retirement Consultants

# Additional information about Sun Life support

We hope you have found today's session informative and feel comfortable in understanding how you can navigate support at Sun Life

- From our CCC to GRS Education and Client Solutions Centre teams, you have the right support as well as digital resources needed to understand all the details and benefits of your Western Pension Plan and Sun Life Retirement & Savings Plan for Western Retirees
- Through our new 360 Plan Advice and dedicated Retirement Services, you can feel confident in knowing you are supported through every step of your retirement journey with Western
- If you have needs for any products not available within the group plan (ex. RESPs) or require comprehensive Estate & Tax Planning Services\*, our Consultants will be able to refer you to a local Sun Life Advisor in your area.

*\* The cost of these supplemental products/services is not included in the cost of your GRS workplace offering.*