

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

Additional information about Sun Life support

We hope you 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 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.