Transition Checklist

Here’s an overview of what you’ll need to do for the move of your Western Pension Plans to Sun Life Financial.

Before the move:

☐ Consider if you wish to attend an upcoming education session with a Sun Life Financial representative to learn more about this transition, your plan and what actions you need to take. Visit the Western website for a list of available sessions.

☐ Be aware of the early December deadline (preparing for the holidays) for making changes to your investment allocations. All changes must be made by December 15, 2016 to take effect December 31, 2016. In late January when your account is fully transferred to Sun Life, you will be able to make changes on any business day.

After the move:

☐ In early January 2017 you’ll receive a welcome letter from Sun Life containing your account number. That number will allow you to register quickly and easily and get your Sun Life access ID and password (if you don’t already have these established with Sun Life). Once you have registered, your account can be accessed anytime by visiting sunlife.ca/western or by using the Login Tool found on any Western Human Resources (HR) webpage.

☐ Watch for another letter that will be sent to you from Sun Life by the end of January showing the details of the asset transfer and advising you that the transfer is complete. You will then be able to review your fund allocations, asset balances and voluntary contribution amounts to ensure everything was transferred correctly. Your final balance (as at December 31, 2016) will be available on the old system in late January to allow you to confirm. At this time you will also be able to access all the Sun Life member services available to you.

☐ Designate your beneficiary to ensure your assets are distributed according to your wishes in the event of your death. Western has access to your last named beneficiary, but a “fresh” designation after the move will ensure Sun Life knows your wishes.

☐ Download the my Sun Life Mobile App, available for your smart phone, and login using your new Sun Life access ID and password. Review your account online, any time, on the go.

☐ Use the online tools at sunlife.ca/western to help you make investment decisions with confidence.

☐ Review your portfolio through sunlife.ca/western to determine if your current investment options are right for you.