



Launching our new Asset Consolidation Tool

We are excited to announce the launch of our new digital Asset Consolidation tool. Your members have the opportunity to participate in the first wave of our pilot, beginning August 2, 2021.

We've created an entirely online experience to help support members moving their assets from another institution, into your group plan. This will improve our current process by significantly reducing the need for paper-based forms for some of our most commonly used products.

By eliminating paper and launching this new digital tool, we will improve completion times for your members. The automated process will prevent a member from providing incorrect information (i.e. wrong product mapping, wrong institution information, no investment instructions). This will help to reduce the errors that cause delays in the consolidation being processed.

Members can find the new tool under the "*Requests*" tab in their mysunlife.ca account.

Questions?

Please reach out to your Sun Life Representative.