

Group Retirement Services



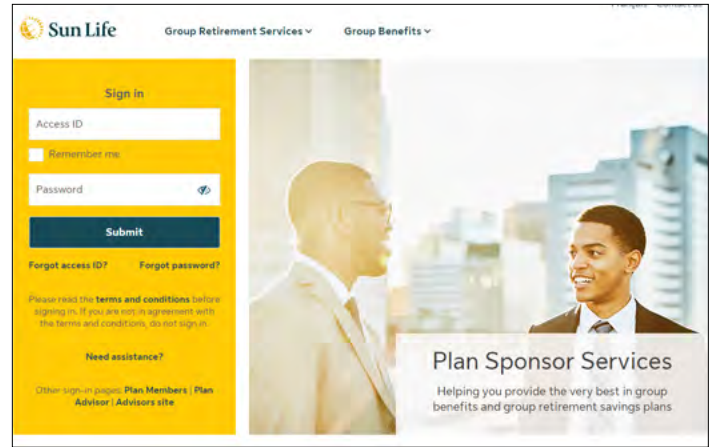
Enter member contributions through the Plan Sponsors Services website. It's easy, safe and accurate – here's how it works:



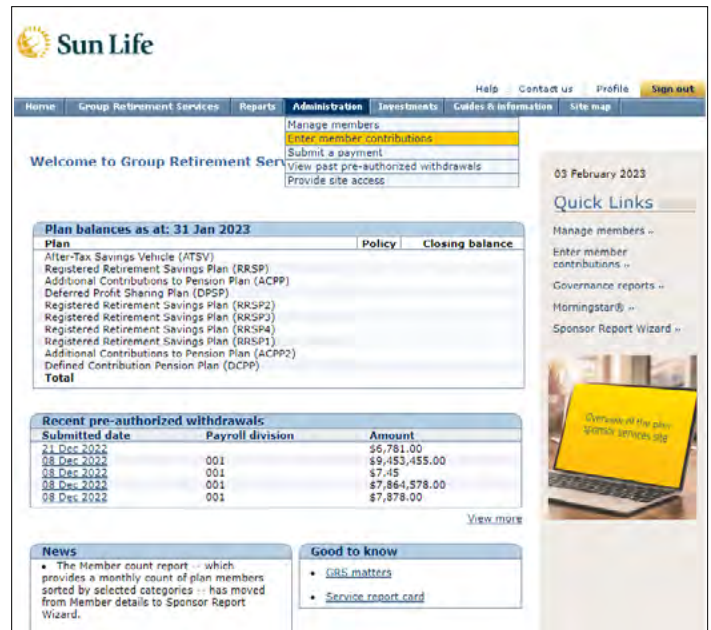
Step 1

Sign in to the Plan Sponsor Services website

- Sign in to the site at **sunlife.ca/sponsor** using your access ID and password.
- Select **Group Retirement Services**.



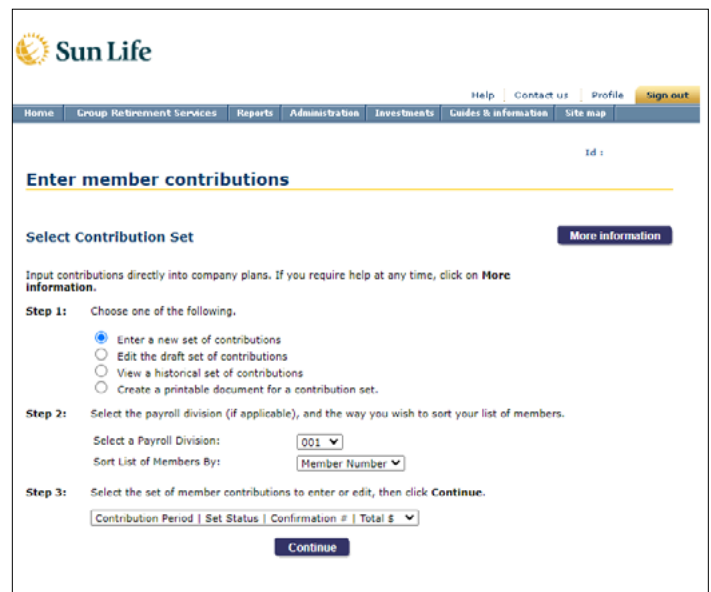
- Select **Enter member contributions** from the **Administration** dropdown menu.



Step 2

Select contribution set

- On the **Enter member contributions** screen, select **Enter a new set of contributions**.
- Select the payroll division (if applicable) and choose whether to sort your list of members by **Member Name** or **Member Number**.



Step 3

Select the set of member contributions to enter or edit

- Select **blank set** to create a new contribution set.
- OR
- From the dropdown list, select a recent contribution remittance that most closely matches the information in your current contribution file and edit where needed.

Enter member contributions

Select Contribution Set More information

Input contributions directly into company plans. If you require help at any time, click on **More information**.

Step 1: Choose one of the following.

- Enter a new set of contributions
- Edit the draft set of contributions
- View a historical set of contributions
- Create a printable document for a contribution set.

Step 2: Select the payroll division (if applicable), and the way you wish to sort your list of members.

Select a Payroll Division:

Sort List of Members By:

Step 3: Select the set of member contributions to enter or edit, then click **Continue**.

| Contribution Period | Set Status | Confirmation # | Total \$ |
|-------------------------|------------|----------------|----------|
| 2022-03-03 - 2022-03-11 | P | 202924001503 | 2,501.00 |
| 2022-01-15 - 2022-01-22 | P | 200021441503 | 3,251.00 |
| 2022-01-15 - 2022-01-22 | P | 200321411503 | 450.00 |
| 2022-01-15 - 2022-01-22 | P | 202324511503 | 500.00 |
| 2019-04-24 - 2019-10-24 | P | 205424251304 | 3,591.00 |
| 2019-08-13 - 2019-08-20 | P | 202013071408 | 6,002.00 |
| 2018-08-31 - 2018-09-07 | P | 203930291108 | 4,500.00 |
| 2018-08-30 - 2018-09-07 | P | 202330561408 | 4,500.00 |

Step 4

Enter contribution information

- Select your **contribution period**. To edit a worksheet, locate the member's name by using **Previous Page** or **Next Page**, or by using the **Member Index**.
- **View Subtotal** provides a summary and contribution dollars subtotal for review.
- Select **Save & Exit** to save the worksheet to draft, select **Save & Confirm** to review the worksheet summary and submit the contributions, or select **Cancel** to exit without saving.

Enter member contributions

New/Edit worksheet More information

Please be aware that clicking **Previous Page**, **Next Page**, or using the **Member Index** will save the values on this page. For help on the Function, please click on **More information**.

For Payroll Division:

What is the contribution period? Start: End:

Viewing: 1 to 10 of 45376

| Member number | Member name | RRSP Monthly Contribution | Employer Required | Member Voluntary Unmatched | Employer Voluntary Matched | Total |
|-------------------|---|---------------------------|-------------------|----------------------------|----------------------------|-------|
| FF194448H | TSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF194448B | TSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF194448D | TSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF904407S | TSTESTSTESTSTESTSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF904412S | TSTESTSTESTSTESTSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF904413N | TSTESTSTESTST, TSTESTSTESTSTESTSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF904426S | TSTESTSTESTSTESTSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF904428J | TSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF904447J | TSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| FF904450J | TSTESTSTESTSTESTSTESTSTESTST, TSTESTSTESTST | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Page Total | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

FF194448H - FF904450J Member Name: Member Number:

Step 5

New/edit worksheet summary

- Either return to continue to **Update worksheet**, **Submit** the set of contributions for payment, or **Exit** the worksheet to return to the **Contributions Submission** main page.

Sun Life

Home | Group Retirement Services | Reports | Administration | Investments | Guides & information | Site map

Help | Contact us | Profile | Sign out

Enter member contributions

New/Edit Worksheet Summary More information

Contribution Period: 01 Jan 2023 - 31 Jan 2023

Client/Program: CAL

Payroll Division: CAL

Number Of Members:

| | Member Required Testz | Member Voluntary Unmatched | Employer Voluntary Matched | Total |
|--------------|-----------------------|----------------------------|----------------------------|--------|
| Total | 100.00 | 150.00 | 200.00 | 450.00 |

Note:

- **Exit** will save the contributions set in DRAFT mode, and return you to the Select Contribution Set Screen.
- **Submit** will save the contributions set in DRAFT mode, and proceed to the Payments section.
- If you wish to transact at a later time, this can be done through the Payments function under **Service Centre**.

You are on a Sun Life Financial website. Please refer to the legal, privacy and security pages for information on the use of this site. Any changes you make on this site may affect information about your particular plan offered by Sun Life Assurance Company of Canada.

Step 6

Send a pre-authorized withdrawal

- Select **Submit** to send a payment. You can set up banking information through the **Add/change banking** option in the **Administration** dropdown menu, if available for your plan. Otherwise, please contact your Sun Life Group Retirement Services representative to set up or change your banking information.

Step 7

Confirm your payment

- The **Confirmation page** will confirm that you have submitted your payment. Please print a copy of the page for your records.
- We will process payments submitted before 4 pm ET on the same business day.
- We will process payments submitted after 4 pm ET on the next business day.
- Contributions submitted before 4 pm ET will be based on the closing values of that day.
- Select **Exit** to return to the **Enter member contributions** page.

You're done!

Select **More information** to access an online user guide that walks you through the contribution process.

The screenshot shows the Sun Life website interface for submitting a payment. The page title is "Submit a payment" and the sub-section is "Pre-Authorized Withdrawal". A "More Information" button is visible in the top right. The main content area displays the following details:

| | |
|---|---------------------------|
| Payment for: | Member Contributions |
| Client/Program: | |
| Payroll Division: | |
| Contribution Period: | 01 Jan 2023 - 31 Jan 2023 |
| Total: | 450.00 |
| Amount for Pre-Authorized Withdrawal (PAW): | 450.00 |
| Confirm Account: | Transit - Account |

Below the table, there is a "Note" section with two bullet points:

- Contributions received by 4 p.m. ET on a Sun Life Financial business day will purchase units based on the closing values of that day.
- Payments received by 4 p.m. ET on a Sun Life Financial business day will be processed the same day. Payments received after 4 p.m. ET, on a weekend or a holiday will be processed the next business day.

At the bottom, there is a prompt: "Select **Submit** to complete the request, or **Cancel** to exit without saving." Below this are three buttons: "View banking info", "Submit", and "Cancel".

The screenshot shows the Sun Life website interface for the confirmation page. The page title is "Submit a payment" and the sub-section is "Confirmation". A "More information" button is visible in the top right. The main content area displays the following details:

Thank you. Your payment has been submitted. Please print a copy of this confirmation for your records.

| | |
|---------------------------------------|---------------------------|
| Payment For: | Member Contributions |
| Client/Program: | |
| Payroll Division: | |
| Contribution Period: | 01 Jan 2023 - 31 Jan 2023 |
| Total: | 450.00 |
| Amount for Pre-Authorized Withdrawal: | 450.00 |
| From Account: | Transit - Account |

Below the table, there is a "Confirmation Number" and "Effective" date:

| | |
|----------------------|--------------------------|
| Confirmation Number: | 03 Feb 2023 10:49:01 EST |
| Effective: | 03 Feb 2023 |

At the bottom, there is a note: "If there are any discrepancies between this confirmation and the amount debited from the bank account, please contact your Group Retirement Services Representative." Below this is an "Exit" button.

Need assistance?

Please contact your Sun Life Group Retirement Services representative.