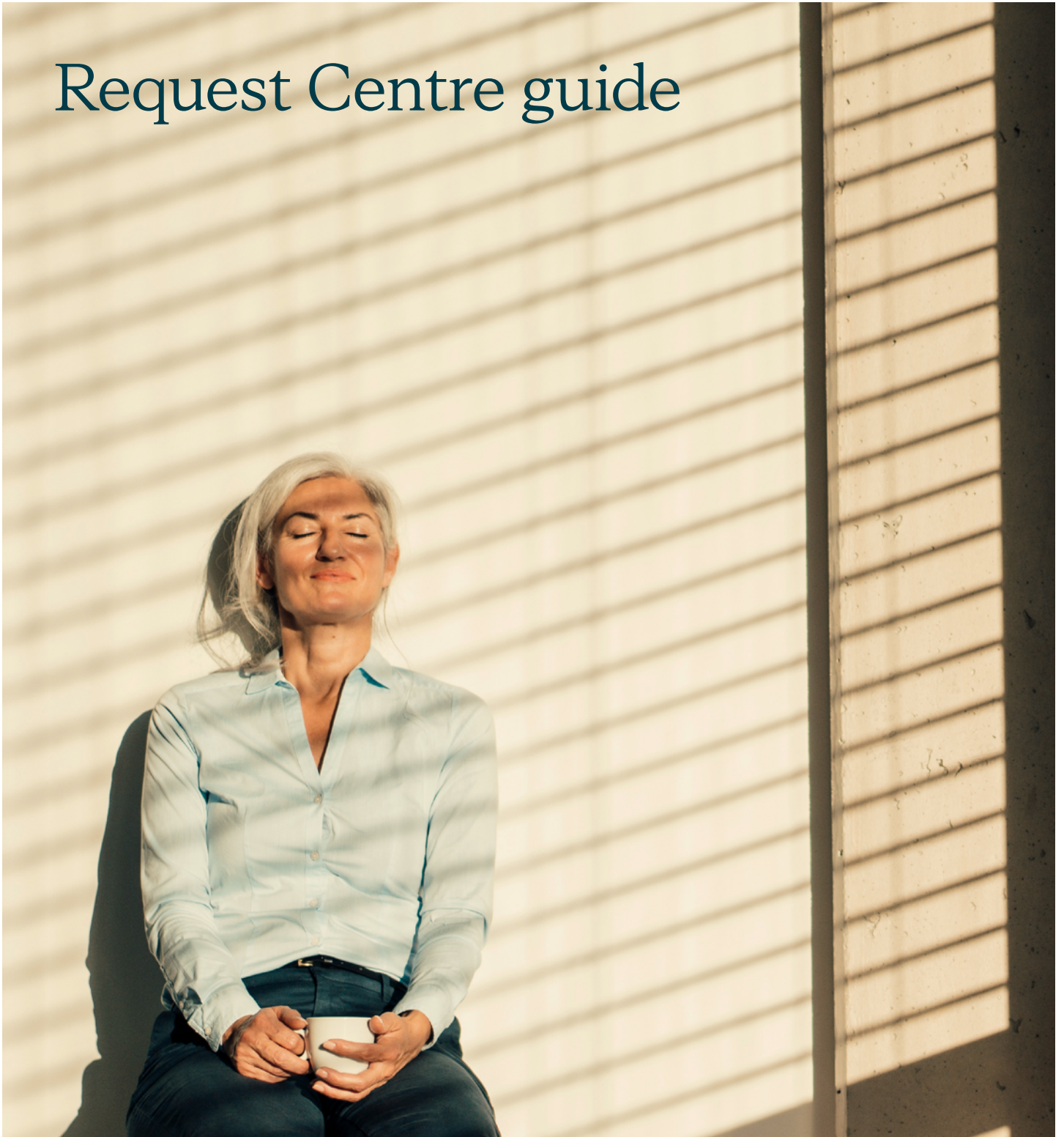


Request Centre guide



It takes a few easy steps:

Step 1

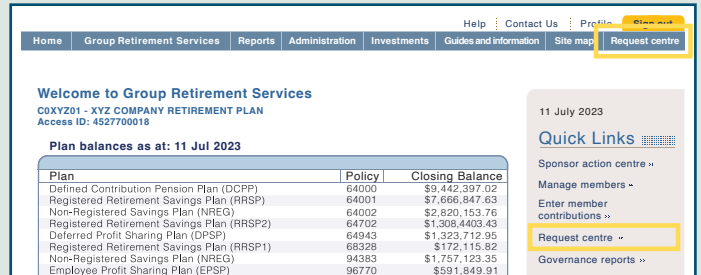
Sign into the **Plan Sponsor Services** website at sunlife.ca/sponsor.



Step 2

On the **Home** page, select **Request Centre** from the top menu.

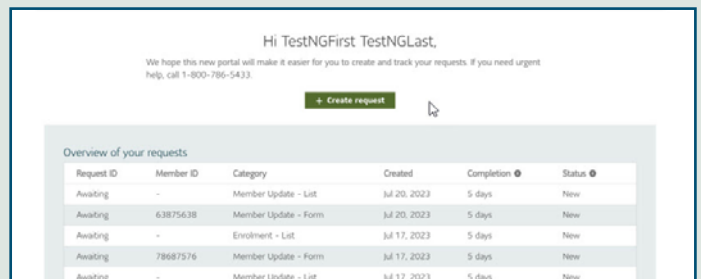
It's also available as a quick link on the right side of the screen.



Plan	Policy	Closing Balance
Defined Contribution Pension Plan (DCPP)	64000	\$9,442,397.02
Registered Retirement Savings Plan (RRSP)	64001	\$7,666,847.63
Non-Registered Savings Plan (NREG)	64002	\$2,820,153.76
Registered Retirement Savings Plan (RRSP2)	64702	\$1,308,4403.43
Deferred Profit Sharing Plan (DPSP)	64943	\$1,323,712.85
Registered Retirement Savings Plan (RRSP1)	68328	\$172,115.82
Non-Registered Savings Plan (NREG)	94383	\$1,757,123.35
Employee Profit Sharing Plan (EPSP)	96770	\$591,849.91

Step 3

Click on the **Create Request** button.

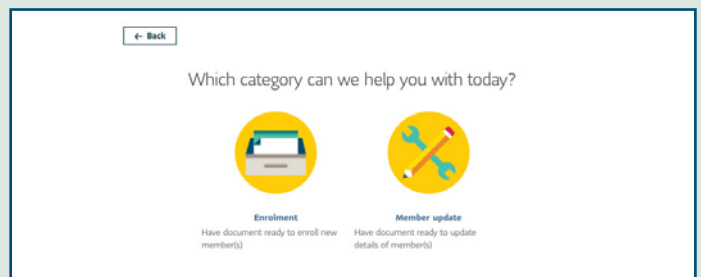


Request ID	Member ID	Category	Created	Completion	Status
Awaiting	-	Member Update - List	Jul 20, 2023	5 days	New
Awaiting	63875638	Member Update - Form	Jul 20, 2023	5 days	New
Awaiting	-	Enrolment - List	Jul 17, 2023	5 days	New
Awaiting	78687576	Member Update - Form	Jul 17, 2023	5 days	New
Awaiting	-	Member Update - List	Jul 17, 2023	5 days	New

Step 4

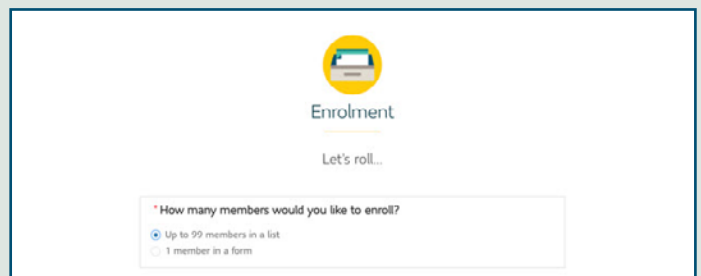
Choose one of the categories:

- **Enrolment** (to submit enrolment information) or
- **Member updates** (to make changes to your members' information)



Step 5

Fill in the information required by the system (number of members, member ID, etc.)



Step 6

Upload or drop in your file.

Please provide the following:

* Total number of members (99 maximum)

* Attachment

Or drop files

Attach 1 .xlsx or .xls file of max 2 MB and 99 members with same Client ID.

Step 7

You can check the status of your requests to stay up to date on the progress.

You'll have access to request history for **2 years**.

✓ Success!

Your request will be completed within quoted business days if all details are in good order for processing.

Confirmation number: 00001489

i You may wish to record this number, however, a new Request ID should appear on your Overview page within 10 minutes for direct tracking.

Where to next?

[Back to Overview page](#)

