



# Sun Life Essentials™

## A workplace savings plan that works for you, and your employees

Workplace savings plans are an important employee benefit, making it easier and faster to save for retirement and other life events. With over 160 years of proven expertise, Sun Life supports 1.63M+ Canadians and manages \$171.2B in assets.

Sun Life Essentials is designed for businesses like yours. It provides tax-efficient savings products for your employees; with the simplicity and level of service they need, to take advantage of what this plan offers.

For you, the plan setup process is easy, digital and there's no cost. This solution doesn't require any asset transfers or minimums for employee membership or contributions. It's affordable and helps to support your employees' financial roadmap.

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## Why employers choose Sun Life Essentials

**Become an employer of choice:** Stand out from other organizations by providing meaningful benefits to your team.

**Attract top talent:** Offer a workplace savings plan that builds financial wellness with a Registered Retirement Savings Plan (RRSP) and Tax-Free Savings Account (TFSA) matching.

**Boost team morale and well-being:** Simple savings benefits that help employees reach their financial goals.

## Benefits

- No set-up fees
- Plan members get access to RRSP and TFSA products
- Annual management fee of 0.9%
- Default plan line-up: one line up of the Sun Life Granite Index+ Target Date Funds & Guaranteed Interest Accounts (GIAs)
- Optional employer-matching
- Access to **my Sun Life mobile app**, innovative resources, financial wellness tools, and expert advice

We understand that the needs of small businesses are as unique as the people running them. Reap the rewards of a healthier and wealthier workforce. Learn more at [sunlife.ca/sunlifeessentials](https://sunlife.ca/sunlifeessentials).

## Questions? We're here to help.

Contact your Sun Life Group Retirement Services Representative.