

# 2023 Year in review

Throughout 2023, we focused on making it **easier** for you to **manage your workplace savings plan** and **helping** your **members save for the future**. Over the last 12 months, we've:

- launched new online capabilities,
- automated services,
- provided financial education and support to plan members, and
- optimized the overall digital experience for you and your employees.

## Making it easier for you to do business with us

### Sponsor Request Centre

500+  
SUBMISSIONS

- A simplified and convenient way to manage your plan online.
- Over 500 submissions since the launch of our pilot.



### 11 How-to Videos

1,000 views = 1,000 times we assisted sponsors in completing plan administration tasks on the secure sponsor site.

### Digital innovation impacts

Allowing Sponsors and members to interact with us how and when they want. **Mobile and web innovations** have led to improved member outcomes.



**Lump Sum Redesign:** Average contribution has increased by 18%



**Mobile enhancements:** Increased YoY traffic by 16% and transactions by 30%



**Digital asset consolidation:** Errors made by members reduced by over 50%

## Providing education and support to plan members



### 360 Plan Advice – Personalized advice from licensed financial services consultants

723K  
MEMBERS

723,000 plan members have access to advice through the CSC representing 515 Plan Sponsors.



### Wellness webinars

110%

Overall attendance is up by more than 110% over last year.

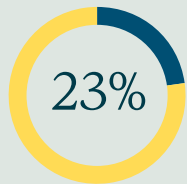


### Sun Life One Plan

3,400

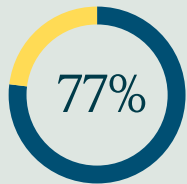
730 unique One Plans created through self-serve engagement via **mysunlife.ca**. 3,400 Sun Life One Plans completed, for our members by our consultants.

## Online Engagement Campaigns



### RRSP

- Over **half a million members** were presented an RRSP message.
- **23% engagement rate – our highest to date.**
- Our mobile channel experienced the largest unique presentation growth, **growing 19% YoY.**



### TFSA

- **Engagement rate improved by 5% YoY.**
- TFSA enrolment from **mysunlife.ca** increased to **77% YoY.**

100K  
ENGAGEMENTS

### MAX Review web campaigns

- 1,189 sponsors participated in a MAX Review campaign this year.
- 375,000 unique presents to members.
- **106,100 members engaged** with a MAX review marketing asset, an **18% increase** from the year prior.
- overall, engagement rate of 28%, representing 4% growth YoY.

43K  
REGISTRATIONS

### Registrations

- **43,200 new registrations** for **mysunlife.ca** and our mobile app.

## Keeping you up to date, providing valuable insights and supporting informed decisions



1.4M  
PARTICIPANTS

### Designed for Savings Report

1.4 million retirement savings participants and 7,500+ group plans.



18  
INDUSTRIES

### Designed for Savings: Industry Focus

18 industries including small business with < 200 member; covers **1.4+ million members** and over **\$105B AUA.**



### Advocacy

Participate in 3 Canadian Life and Health Insurance Association (CLHIA) committees where pension policy and advocacy are discussed. **Sun Life chairs one of those committees.**

3 CLHIA  
COMMITTEES

