

SunAdvantage



Our SunAdvantage solutions are dedicated to businesses like yours. Allowing you to focus on what's important, while we help you take care of your employees' health and financial needs.



Better together

Having both your group retirement services and group benefits, through our **SunAdvantage** workplace plans provides the best experience for your employees.

Access is quick and convenient. Simply put, they can view all their group retirement and group benefits information in one place.

Retirement savings plan

SunAdvantage™ my savings is designed for businesses with a minimum of five employees, and more than \$15,000 of annual plan contributions. It delivers tax-efficient savings opportunities for plan members, with the simplicity and level of service that they need to take advantage of what the plan has to offer.

With **my savings**, you have two ways to help your members save. Choose the combination of savings products that's right for your business:

- **Option 1:** a Registered Retirement Savings Plan (RRSP), a Deferred Profit Sharing Plan (DPSP) and a Tax-Free Savings Account (TFSA)
- **Option 2:** a Registered Retirement Savings Plan (RRSP) and a Tax-Free Savings Account (TFSA)

Consider the features of this attractive retirement savings solution:

- **Great fund choices.** Plan members can choose from a diversified lineup of exceptional Sun Life -branded funds from top investment managers.
- **Competitive fees.** Funds often have lower-than-retail fund management fees, so your plan members pay less and save more over time.
- **Employee support.** Plan members enjoy ongoing support, with 24/7 access to Sun Life tools and services, including customizable member education material.
- **Easy administration.** **SunAdvantage my savings** is fully supported by Sun Life, from recordkeeping to reporting to investment governance, so you can enjoy hassle-free administration.

SunAdvantage™ my savings can provide you with a competitive advantage to help you attract and retain employees. It's a cost-effective solution that can provide your employees with an easy, tax-effective way to save for their futures.



Group benefits plan

Innovative and flexible coverage to suit your unique business needs. Our **SunAdvantage** solution includes:

- affordable plan design options,
- easy set-up with our administration kit and access to our Plan Sponsor Services website,
- a dedicated Customer Service Administrator to support you whenever needed,
- a customized coverage guide for plan members to help them make the most of their workplace benefits plan.

Available SunAdvantage Benefits include:

- Dental
- Extended Health Care (EHC) coverage
- Additional Lumino Health Virtual Care Services (provided by Dialogue)
- Spending accounts
- Life insurance
- Short-Term Disability (STD)
- Long-Term Disability (LTD)
- Other optional offerings

Digital experience and flexibility

Sun Life enhances the plan member experience with the **my Sun Life mobile app**. It is available on the Android and IOS platforms. We provide a single mobile app as a one-stop shop for both group retirement and group benefits. They can sign in using the same access credentials and password as on **mysunlife.ca**. No additional fees apply for the app. Plan members can manage their health benefits, savings, personal investments, and insurance policy anywhere from their mobile device of choice.

We know businesses like yours are taking a more proactive approach to managing wellness - mental, physical, and financial. At Sun Life we offer innovative products and services that allow you to reach your company's goals, and help your employees stay healthy and plan for their financial future.

Questions?

For more information, please contact your advisor.

*Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies.
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