

Important update to your pension plan

The Board of Trustees regularly monitors the Defined Contribution component of the **University of Winnipeg Trusteed Pension Plan** to make sure it's competitive and helps you reach your long-term retirement savings goals. After a recent review, and based on plan member feedback to a recently conducted employee opinion survey, we are adding a new **RBC Fossil Fuel Free Global Equity Fund**, effective October 2, 2017. Please read this communication to learn more about this fund.

What's changing? On **October 2, 2017**, a new fund – the **RBC Fossil Fuel Free Global Equity Fund** will be added to both the Defined Contribution Plan as well as the Group RRSP.

The Investment Objective of the Fund is to provide long term capital growth, while explicitly restricting exposure to fossil fuels.

Companies that are directly involved in extracting, processing or transporting coal, oil, or natural gas and companies included in "The Carbon Underground 200" are excluded from the strategy.

For more information on this Fund, please refer to the attached Strategy Profile.

Update your retirement portfolio

You can access Sun Life Financial's Plan Member Services website at **mysunlife.ca** to update the investment options in your retirement portfolio. But, before you do this, follow these steps to ensure your investment strategy is right for you.

Your access ID and password

You'll need a personal access ID and password to access your account online or by phone.

Don't have an access ID or password?

Go to **mysunlife.ca** and select **Register**. You will need your account number (available on your welcome letter or your statement) and your date of birth.

Forgot your access ID and/or password? Select the appropriate links under **Sign-in help** on **mysunlife.ca**.

Step 1 – Getting started

Sign in to **mysunlife.ca** using your personal access ID and password and select **my financial centre** on the **Home** page.

Step 2 – How comfortable are you with investment risk?

You can determine your comfort level with investment risk by completing the **Investment risk profiler** (known as the **Asset Allocation tool** online). Once you've signed in, select **my money tools** under the **Resource Centre** drop-down menu and select **Continue** to begin.

Step 3 – What's your vision of retirement?

Planning can be easy with the **Retirement planner**. The planner lets you determine how much you need to save now to provide you with your desired income level in retirement. You can adjust a number of variables, and as they change over time, use the planner to update your calculations to see if any changes to your plan are necessary. To access this tool, select **my money tools** under the **Resource Centre** drop-down menu followed by **Retirement planner**.

Step 4 – Learn about your investment options

To access detailed fund information through **Morningstar®**, a leading provider of investment news and analysis, select **Investment performance** from the **Accounts** drop-down menu. Next, select:

- **Rates of Return and Unit Values** to see the performance of funds available in your plan; or
- **Fund Report** to access tools and information about your funds.

Step 5 – Update your investments

To update your investment selections, select **Change investments** under the **Requests** drop-down menu. You can also update your account by calling Sun Life Financial's Customer Care Centre at **1-866-733-8612** any business day from 8 a.m. to 8 p.m. ET.

There are no charges for transfers; however, a two per cent fee may be charged if you make a transfer into a fund followed by a transfer out of the same fund within 30 calendar days.

Questions?

If you have any questions, please contact Sun Life Financial's Customer Care Centre at **1-866-733-8612** from 8 a.m. to 8 p.m. ET any business day.

Know your responsibilities

As a member of the **University of Winnipeg Trusteed Pension Plan** you're responsible for making investment decisions and for using the tools and information that have been provided to help you make these decisions. You should also decide if seeking investment advice from a qualified individual makes sense for you.