



Discover Achieve Belong



It's never been **easier**  
to **navigate** your  
financial future



Start by signing in to [mysunlife.ca/uwinnipeg](https://mysunlife.ca/uwinnipeg) and select **my financial centre** under **my financial future**.



## 1 Group Retirement Services

### my financial centre:

Access your account information

### money UP:

Game-inspired way to learn more about your workplace retirement plan

## 2 Accounts

### Balances:

Summary / Details

### Statements

### Transaction history:

Summary / Details

### Account fees:

Fund Management Fees / Service Fees

### Investment mix – charts:

Your investment mix pie chart

### Investment performance:

Includes a direct link to Morningstar®

### Personal rates of return:

Summary / Details

## 3 Requests

### Change investments

### Tax slips & RRSP info

### Leaving the plan

### Retiring soon

## 4 Resource Centre

### my plan

### Investment guide:

Online **my money @ work** Guide

### my money tools:

1. Asset allocation (Investment risk profiler)
2. my retirement plan
3. Retirement planner
4. Tools
  - a. Withdrawal calculator
  - b. Capital gains vs. RRSP tax comparison calculator
  - c. Mortgage vs. savings calculator
  - d. RRSP loan calculator
  - e. Tax calculator for non-residents
  - f. Annuity premium calculator
  - g. Old Age Security (OAS) clawback calculator
  - h. Registered Retirement Income Fund (RRIF) calculator
  - i. Saving my bonus
  - j. Saving my raise
  - k. Small amounts equal big savings
  - l. Save today for more tomorrow

### my learning centre:

Basics of group retirement plans & investing (four videos)

### Glossary:

Glossary of terms

### Forms:

Government and Sun Life Financial forms

## 5 Quick Links

Quick and easy access to the most commonly used functions

## 6 Profile

### Access Info:

Managing your access ID & password

### Personal Info:

Address Info