



Important news about your McGill University Pension Plan and Savings Program

On behalf of the Pension Administration Committee ([PAC](#)) and McGill University, we are pleased to announce that starting at the end of **August 2020**, Sun Life Financial (Sun Life) will become the **new recordkeeping provider** for the McGill University Pension Plan (MUPP) as well as our other savings programs, such as the Group Retirement Savings Plan and Group Life Income Fund. Be assured that the investment management of the MUPP remains unchanged.

Additionally, with the move to Sun Life, you will gain access to both a **NEW [Tax Free Savings Account](#)** and a **Variable Benefits Option**. More information on these programs will be provided in the coming weeks.

Why the change?

Together with Sun Life, we want plan members to benefit from the ease of administration of the McGill University Pension Plan and other Savings arrangements and make available to you additional resources in your retirement and financial planning efforts.

Through this partnership with Sun Life, who is Canada's leading provider of group savings arrangements, you will gain access to a vast array of investment information, specialized sessions, webinars, articles and much more will be available to support and help you build your investment knowledge and help you feel more confident in your savings decisions. In-house information sessions hosted by Human Resources will continue to be available.

As a plan member, you will have access to the website [mySunLife.ca](#) where you will be able to:

- Find out what type of investor you are with the **Asset allocation tool**
- Plan for retirement with the **Retirement Planner**
- Stay up to date with your investments with **Morningstar® Investment performance** information
- Review account balances and manage your investments
- Ease of account access with **Single Sign-On** avoiding re-entering credentials when accessing your account

Always there to help

If you need support, you can reach Sun Life in a variety of ways to suit your needs:

- **Go mobile:** You can check your balances and see how your funds are doing
- Visit [mySunLife.ca](#) for tools, articles and webinars and also **Chat live** to get live support
- Want to speak to a financial advisor? A toll-free number will be provided.

What's next?

The Pension Administration Committee (PAC), Human Resources, and Sun Life are working together to ensure a smooth transition for you. In the coming months, you'll get more information and details on the transition to Sun Life.

Watch for updates to make sure you're ready to take advantage of the new features in **August 2020!**

Sincerely,

Handwritten signature of Professor Julia Scott in black ink.

Professor Julia Scott
Chair of the PAC

Handwritten signature of Ms. Diana Dutton in blue ink.

Ms. Diana Dutton
Associate Vice-Principal Human Resources

June 2020