

# Do more with the my Sun Life mobile app

Here's how to send us  
documents through the app.

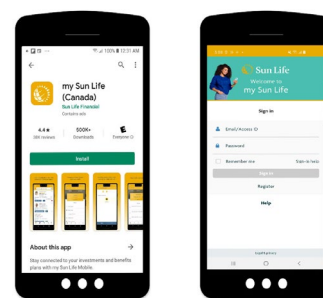


## Step 1:

Download the app  
and sign in

- Download the **my Sun Life mobile app** from the Google Play store or the Apple app store.
- Open the app and sign in using your sign-in ID and password.

*Need to register?* Select **Register** when you open the app and follow the instructions.



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

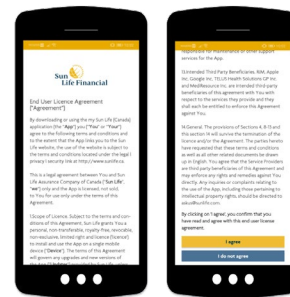
© Sun Life Assurance Company of Canada, 2021.

## Step 2:

Review some important information and features

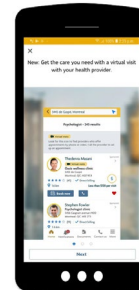
- The first time you sign in, you'll see the contract between you and Sun Life, called the End User License Agreement.

- Scroll down and select **I agree**.



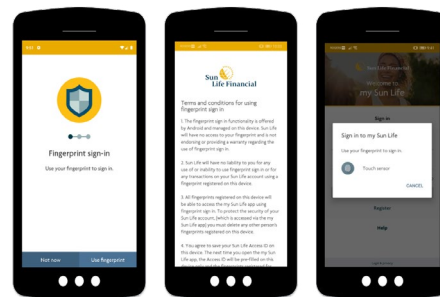
- From time to time, you'll see information about new features we've added to the app.

- Select **Next** or click the **X** to close the pop-up.



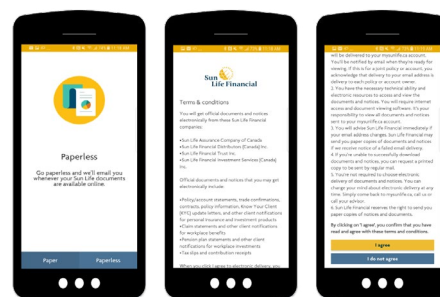
- The first time you sign in, we'll ask if you want to set up a 'fingerprint' preference. This lets you sign in using your fingerprint in the future. Your mobile device needs to have 'fingerprint' permission turned on to use this feature.

- Follow the instructions to set this up, if you'd like.

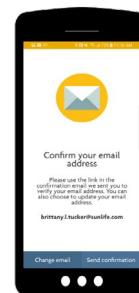


- The first time you sign in, we'll ask you to set your print preference. You can choose either **Paper** or **Paperless**.

- If you choose **Paperless**, you'll see some terms and conditions to agree to.



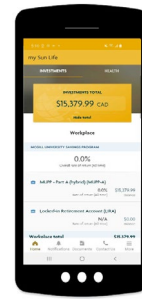
- We'll also ask you to confirm or validate your email address the first time you sign in.



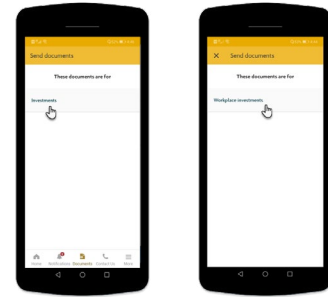
### Step 3:

#### Upload your documents

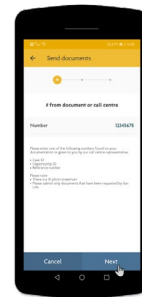
- On the **Home** page, you can review basic information about your plan.
- To send documents, select **Documents** at the bottom of the page.



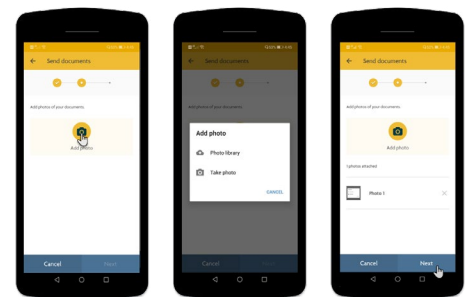
- Choose **Investments**, followed by **Workplace investments**.



- In the **Number** field, enter the reference number that was given to you by our Client Care Centre or that's on your document.
- If you need help, call us at **1-888-444-2023** from 8 a.m. to 8 p.m. ET, Monday to Friday.



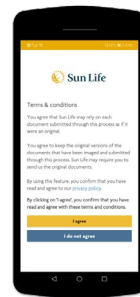
- Choose the picture of your document you want to upload. You can either take a picture or choose one you already have on your phone.
- You'll have to give the app permission to access your phone's camera and pictures.



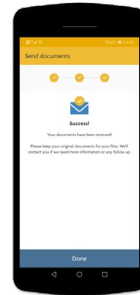
### Step 3:

#### Upload your documents

- Your last step is to review our terms and conditions. Select **I agree** to continue.



- When you're finished, you'll get a confirmation number. Select **Done** to get back to your Home page.



## We're here to help



**Go mobile:** Check your balances and see how your funds are doing.

Download the **my Sun Life mobile app** on Google Play or the Apple App Store.



Visit [mysunlife.ca](https://mysunlife.ca) for tools, articles and videos. Sign in and select **Chat live now** to get live support.



Call us at **1-888-444-2023** Monday to Friday 8 a.m. to 8 p.m. ET



Consider speaking with a financial advisor (registered as a Financial Security Advisor in Quebec) of your choice to get personalized advice about your plan.