Enrol

in the MCAA Group Insurance and Medical Benefits Trust Retirement Plan online. *It's easy!*

As an employee of the **Mechanical Contractors Association of Alberta**, you can enrol in the Registered Retirement Savings Plan (RRSP) or Tax-Free Savings Account (TFSA) online. Joining the plan is easy; it only takes five to ten minutes. And you'll be glad you did – there is no better way to save for your future than through your plan at work.

How to enrol online

Step 1 – Review the my money @ work guide

The **my money @ work** guide is an easy-to-read enrolment guide that gives you all the information you need to understand the benefits of your plan. It includes a list of the funds offered under your plan and their corresponding investment management fees (IMFs). The online flipping book version of your **my money @ work** guide is also available at **mysunlife.ca**, with extra videos and interactive elements to help make your enrolment decisions easier (see Step 3).

Step 2 – Sign in

To start the enrolment process, simply sign into **mysunlife.ca** using the company's generic access ID and password (access ID: **26921**, password: **259551**). **Please note that you will require access to a printer to complete your online enrolment process.**

Step 3 – Enrol

Follow these steps to enrol in the **MCAA Group Insurance and Medical Benefits Trust Retirement Plan**:

- Review the **my money @ work** guide located on the **Welcome** page.
- Select **Let's get started!**
- Review/print your online **Enrolment Guide**, which highlights the specifics of your plan.
- Enter your **Identification Number** (this is your five-digit employee number at MCAA) and select **Save and Continue**.
- Enter your personal information and select **Save and Continue**.
- Select the RRSP and/or the TFSA; then **Save and Continue**.
- At this point you will be prompted to use the online tools available to help you with your investment decisions:

  ✓ Learn more about your investment options through **Morningstar**® by selecting **Investment performance** from the **Accounts** drop-down menu; and

  ✓ Access several financial planning tools, like the **Investment risk profiler** and the **Retirement planner** through **my money tools** under the **Resource Centre** drop-down menu.
- Choose your investments by allocating a percentage of your contributions to each fund you wish to invest in, up to 100%.
- Print, complete and submit the **Automatic Cheque Plan** (ACP) form, along with a void cheque, to the address provided on the form. This will allow you to make automatic contributions from each paycheque.
- Print, complete and submit the **Beneficiary Designation** form to the address indicated on the top of the form.
- Review the information you have entered under **Plan summary** (you should also print this for your files); if you want to make any changes, select one of the tabs under **Enrol**. Select **Submit** to complete the enrolment process.

After you enrol

A few days after your enrolment you will receive a welcome letter. To gain access to **mysunlife.ca** you'll need a personal access ID and password to manage your account(s). To do this, simply select the **Register** link on the sign in page. Follow the instructions provided. You will need your account number (see your welcome letter for this number) and your date of birth.

Questions?

Call the Customer Care Centre at **1-866-896-6984** any business day from 8 a.m. to 8 p.m. ET.

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