

# No matter where life takes you

Keep many of the advantages you've grown accustomed to!

And benefit from a seamless cost-free transition from one group plan to another.

# The *transition* group savings program provides:

- Access to a wide variety of market-related funds, including responsible investment (RI) options, not typically available outside of a group plan
- The flexibility of choosing an expertly built and monitored investment solution or a more hands-on approach
- The opportunity to make changes to your investments, with no fees or minimum contributions applicable to market-related funds
- The services and tools you need to keep on top of your savings
- Guidance and support—today and throughout your life

Desjardins Insurance helps you grow your savings and reach your goals.



## Join the program

### By completing the forms

1 Complete the enrolment and investment instructions forms.

Don't forget to:

- share your email so we can keep in touch
- name your beneficiary(ies)
- tell us whether you'd like to keep contributing
- complete the investor profile questionnaire before making your investment selection
- 2 On your options statement:

Go to the section(s) to be returned, check option 1 and sign the form(s).

3 Return the forms to Desjardins Insurance.

Send them via the *Contact us* page of your online account (access it with your existing group and participant numbers, as shown on your options statement). You can also mail them to us.

#### What's next?

Access your online account and keep using our planning tools or discover what's new in the Wellness Centre.

Make sure to review your *Plan summary*. You can also consult it, along with other information regarding the program, by scanning the code or visiting <a href="https://bit.ly/program-for-life">bit.ly/program-for-life</a>.



### By enrolling online

If the letter provided with your options statement refers to express online enrolment.

1 Create your account (if it's already done, go to step 2)

Use the group and participant numbers shown on your options statement.

#### Via Omni, our mobile app

Download Omni Desjardins and click through the welcome screens.



- On the Omni home screen, select Group retirement savings.
- Click the Register link, under the Log on button, to create your user ID and password.

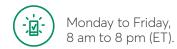
#### Via dfs.ca/GroupPlanMember

Below the image, a tutorial is there to guide you. Or, just follow these steps:

- In the image, click the green **Go** button, under *Log on to your account*.
- Click the Register button in the right-hand section to create your user ID and password.
- 2 On your Group retirement savings home page
  - Click Enrol in your transition plan and follow the steps!



### **Questions?**



1-800-968-3587



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