



**We're still
here to help
you bring your
dreams to life**



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

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 bit.ly/program-for-life.



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.

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?



Monday to Friday,
8 am to 8 pm (ET).

1-800-968-3587

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Insurance
Life • Health • Retirement

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