

Enrolment express

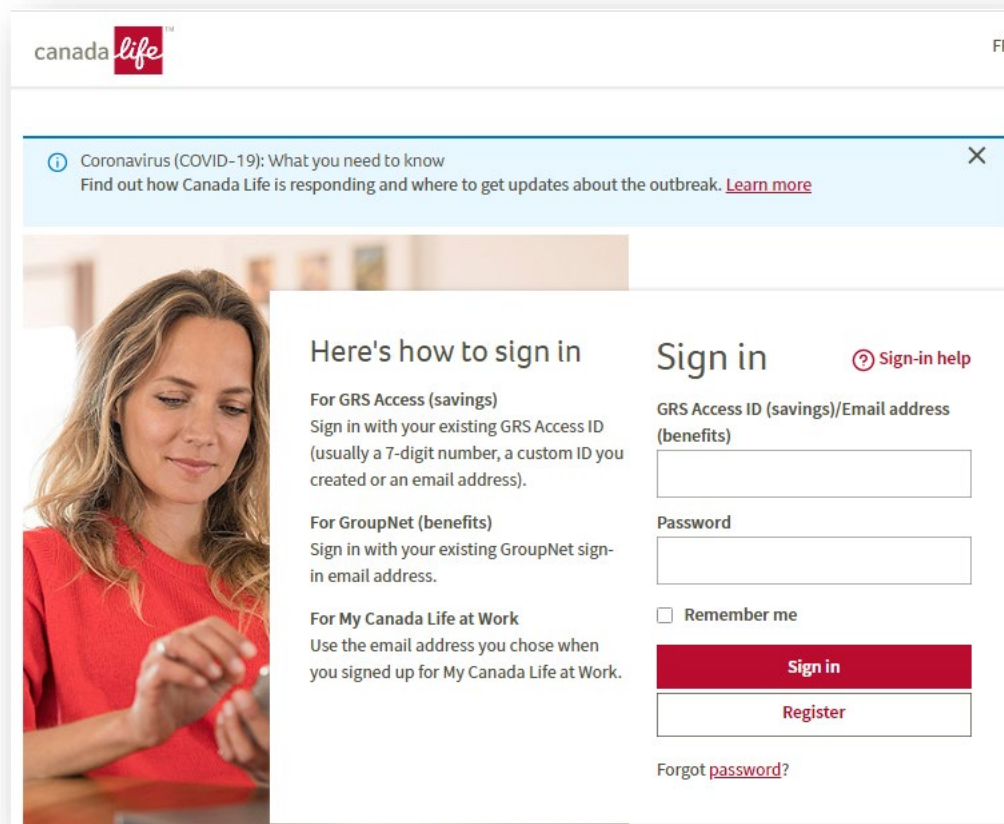
Enrol in your Canada Life Group Retirement or Savings Plan online



Which web browser should I use to sign in?

- Google Chrome (preferred)
- Microsoft Edge Chromium
- Mozilla Firefox
- Apple Safari

To get started go to
mycanadalifeatwork.com



canada life™ FR

Coronavirus (COVID-19): What you need to know
Find out how Canada Life is responding and where to get updates about the outbreak. [Learn more](#)

Here's how to sign in

For GRS Access (savings)
Sign in with your existing GRS Access ID (usually a 7-digit number, a custom ID you created or an email address).

For GroupNet (benefits)
Sign in with your existing GroupNet sign-in email address.

For My Canada Life at Work
Use the email address you chose when you signed up for My Canada Life at Work.

Sign in [Sign-in help](#)

GRS Access ID (savings)/Email address (benefits)

Password

☐ Remember me

Sign in

Register

Forgot [password?](#)

Enrol now! Enter your guest Access

- Your Access ID 8551184
- Your Password Ubre8KE2

Visit the guest site



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Join your group retirement or savings plan now.

Enrol

- Learn about the funds in your plan
- Find information to help you make informed decisions

Visit guest site ➔



Adhésion
express

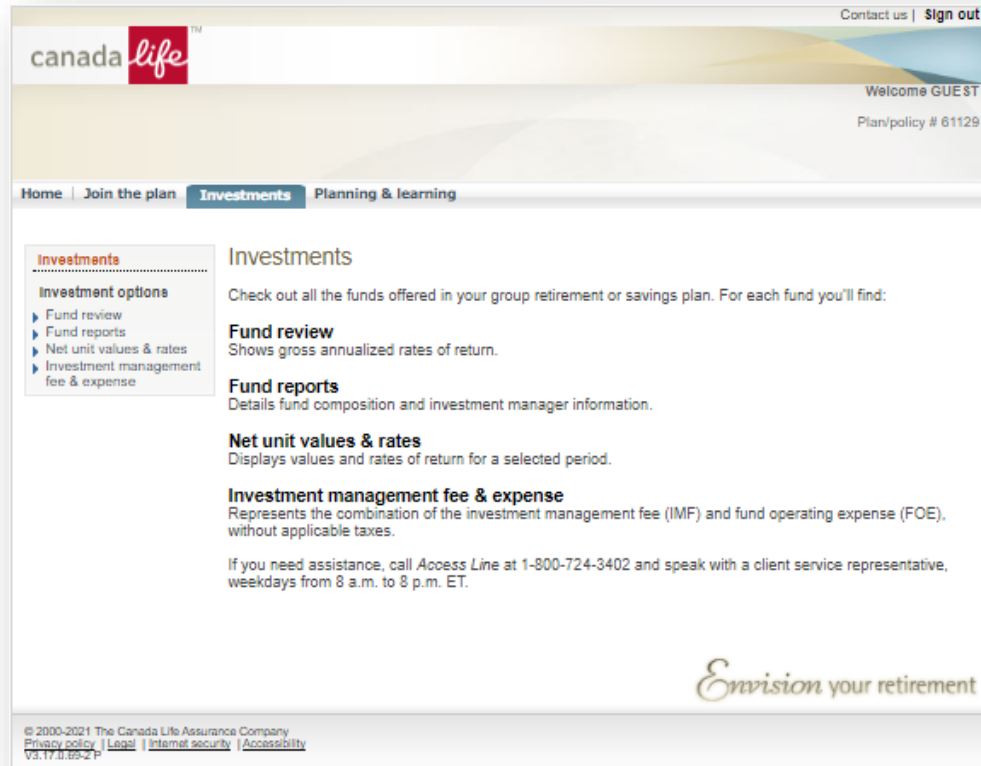
Adhézerez à votre régime de retraite ou d'épargne collectif dès maintenant.

Adhérer

- Apprenez-en davantage sur les fonds offerts dans votre régime
- Obtenez de l'information pour vous aider à prendre des décisions éclairées

Consulter le site pour les invités ➔





Visit the guest site

- Investment information
- Planning and learning section

Enrol to join your plan



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Français | Contact us | Close

Get started on your future today.

Your group retirement or savings plan will help you save for your retirement, with access to tips and tools along the way.

[Get started ➔](#)

Your retirement or savings plan enrolment

Enrolling in your plan is an easy but important step towards having a successful savings or retirement goal. Do this for yourself – because your participation and choices make a difference.

The Access ID and password you create will give you online access to your account.

About your group plan

Get started

- To enrol click on Get started
- Or watch a video about the benefits of joining a group plan

About you

General

**Required fields*

*First name Initial *Last name
Chris Marion

*Date of birth
(MM DD YYYY)
12 15 1988

*Social insurance number
You're authorizing use of your S.I.N. for identification, tax reporting and record-keeping.
1

*Gender
☐ Male ☐ Female

Your personal information

- Social insurance number
- Address

Create your Access ID and password

Create your own Access ID and password and remember it for later, for easy access to your account, as well as educational tools and resources.

**Required fields*

*Access ID

(At least six characters, with no spaces)

cmari@gmail.com

*Password



*Confirm password



Select security questions

Select three security questions and give different answers for each, using only letters or numbers.

Create your Access ID and password

- You can use your email address as your Access ID
- The ? identifies the password rules
- Continue to contact details



Once you've created your Access ID you can log off at any time

- If you don't have time to complete your enrolment
- If you've created an Access ID and password, you will start back where you left off
- Just sign back in using the personal Access ID and password that you created

Plan types

[Tips & tools ▼](#)

ABC COMPANY - DEMOE

Select the plan you're enrolling in. You may not be eligible for all plan(s). If you're unsure, contact your plan sponsor.

| Plan name | Status |
|---|-----------------------------|
| REGISTERED PENSION PLAN | Enrol now ➞ |
| DEFERRED PROFIT SHARING PLAN | Enrol now ➞ |
| REGISTERED RETIREMENT SAVINGS PLAN Personal: You're the owner/applicant and contributor to the plan. | Enrol now ➞ |

Select a plan to enrol

- Only options that are available to you will be available
- You may have access to more than one plan type
- You must go through the enrolment process for each plan type you want to join

Select investments

Plan types

Contributions

Investments

Beneficiaries

Submit

Investments

Tips & tools ▼

Select your investments by choosing an option below.

Your plan sponsor makes some investment decisions for this plan.

Option 1

Express option

A hands-off approach to investing. Simply choose a fund based on your desired retirement date. This investment is called a target date fund. [More information](#)

The fund recommended below is based on the retirement age of 65.

Recommended

☒ CONTINUUM 2055 (PSG)
[Fund report \(PDF\)](#)

☐ Change your retirement year
CONTINUUM 2055 (PSG) ▼
[Fund report \(PDF\)](#)

Select & continue ➡

Option 2

You know what kind of investor you are

If you know what kind of investor you are, select an investor type below.

An investment will be recommended based on your investor type.

Select investor type ▼

[Compare investor types](#)

Select & continue ➡

Option 3

Find out what kind of investor you are

Complete the *Investment personality questionnaire* to find your investor type.

An investment will be recommended based on your investor type.

Continue ➡

Option 1

Express option

A hands-off approach to investing. Simply choose a fund based on your desired retirement date. This investment is called a target date fund. [More information](#)

The fund recommended below is based on the retirement age of 65.

Recommended

☒ CONTINUUM 2055 (PSG)
[Fund report \(PDF\)](#)

☐ Change your retirement year

CONTINUUM 2055 (PSG) ▼

[Fund report \(PDF\)](#)

Select & continue ➔

Option 2

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Select investor type ▼

[Compare investor types](#)

Select & continue ➔

Option 3

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An investment will be recommended based on your investor type.

Continue ➔

Select investments

- **Option 1** – select a target date* fund
- **Option 2** – choose your investor type to select a target risk* fund
- **Option 3** – complete the Investment Personality Questionnaire to help you build your own portfolio



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Recommended asset mix

You've indicated your investor type is aggressive. The pie chart shows a recommended mix of [asset classes](#) for your investor type, and how much should be invested in each.

This asset mix consists solely of equity investments. It's designed for investors who want the potential for maximum long-term growth. It's appropriate for investors who have a long period of time to invest and aren't concerned about short-term investment volatility.

Select your investments

Using the pie chart as your guide, pick an asset class. Pick an investment, or investments, from that asset class. Choose how much of your contribution you want to invest in.

For better diversification, invest no more than 25% in one. If the asset mix shows more than that, think about choosing more than one investment from the asset class.

?

Balanced Funds

?

Canadian Equity Funds

?

Cash and Equivalent Funds

?

Fixed Income Funds

?

Foreign Equity Funds

?

Asset Allocation Funds

| Name of investment | Fund report |
|--|-------------|
| <input checked="" type="checkbox"/> CANADIAN EQUITY (JF) | |

Your selection

Choose how much you'd like to invest in each investment (must add up to 100%).

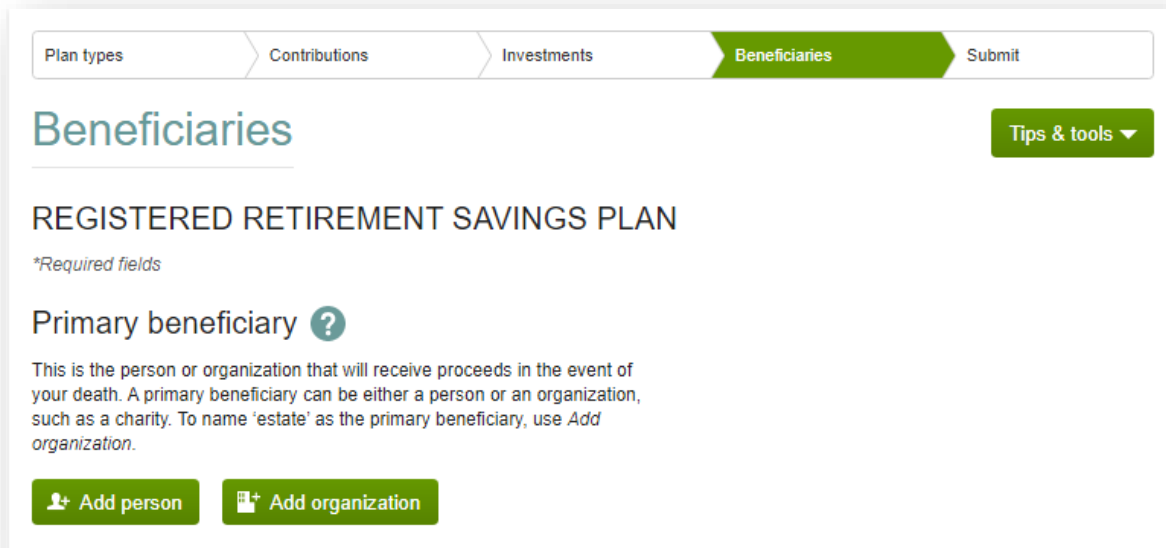
| | |
|---------------------------|--------------------------------------|
| Balanced Funds | 25.000% |
| CANADIAN INCOME (PORTICO) | <div><div></div><div>25</div>%</div> |
| Canadian Equity Funds | 45.000% |
| CANADIAN EQUITY (JF) | <div><div></div><div>45</div>%</div> |
| Cash and Equivalent Funds | 0.000% |
| Fixed Income Funds | 0.000% |
| Foreign Equity Funds | 0.000% |
| Asset Allocation Funds | 0.000% |
| Total | 70.000% |

Option 3 – discover your investment personality

- The **Investment Personality Questionnaire** will provide a suggested asset mix to help you build your own portfolio.

Designate beneficiary(ies)

- You must designate a trustee for any beneficiary that is **under** age 18



The screenshot shows a web interface for managing a Registered Retirement Savings Plan (RRSP). At the top, there is a navigation bar with five tabs: 'Plan types', 'Contributions', 'Investments', 'Beneficiaries' (which is highlighted in green), and 'Submit'. Below the navigation bar, the title 'Beneficiaries' is displayed in a large, blue font. To the right of the title is a green button labeled 'Tips & tools' with a downward arrow. Below the title, the text 'REGISTERED RETIREMENT SAVINGS PLAN' is shown. Underneath this, the text '*Required fields' is displayed. The main section is titled 'Primary beneficiary' with a question mark icon. Below this title, there is a paragraph of text explaining that the primary beneficiary is the person or organization that will receive proceeds in the event of the plan holder's death. It also states that a primary beneficiary can be either a person or an organization, such as a charity, and that to name 'estate' as the primary beneficiary, the user should use the 'Add organization' button. At the bottom of the section, there are two green buttons: 'Add person' and 'Add organization'.

Plan types Contributions Investments **Beneficiaries** Submit

Beneficiaries

Tips & tools ▼

REGISTERED RETIREMENT SAVINGS PLAN

**Required fields*

Primary beneficiary ?

This is the person or organization that will receive proceeds in the event of your death. A primary beneficiary can be either a person or an organization, such as a charity. To name 'estate' as the primary beneficiary, use *Add organization*.

+ Add person + Add organization

Review

About you

Name: Chris Marion
Date of birth: December 15, 1988
Social insurance number : 620 292 474
Gender: Female

Address:
123 anystreet
london, ON
N5V 4N1
Email: cmari@gmail.com
Province or territory of employment: ON

Edit

Contributions

The following will be deducted from your pay:
MEMBER - You didn't enter an amount.
MEMBER VOLUNTARY - You didn't enter an amount.

Edit

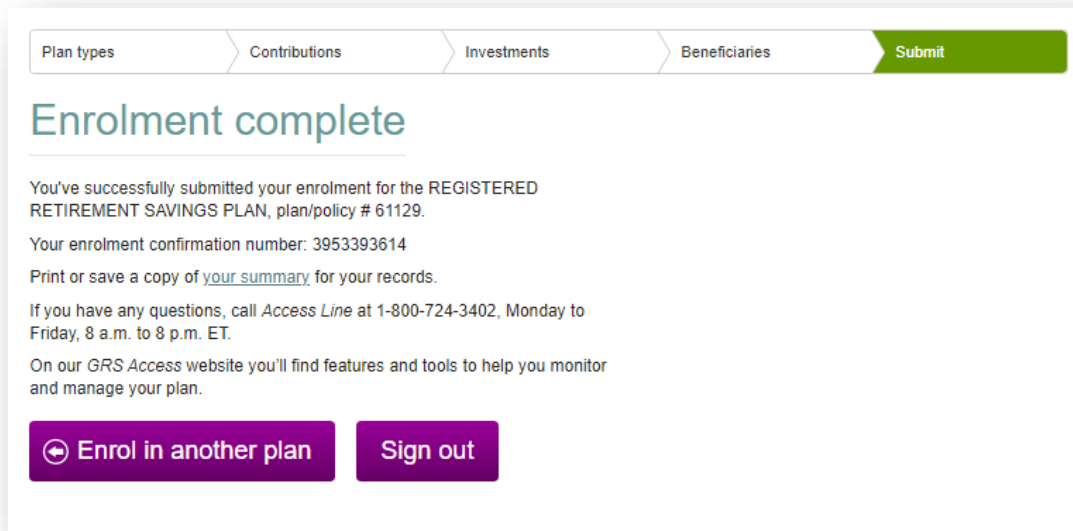
Investments

Review and submit

- Confirm that the information is correct
- Click submit

Want to join another plan type?

- Click Enrol in another plan



The screenshot shows a web interface with a progress bar at the top containing five steps: Plan types, Contributions, Investments, Beneficiaries, and Submit. The 'Submit' step is highlighted in green. Below the progress bar, the heading 'Enrolment complete' is displayed in a teal color. The main content area contains the following text: 'You've successfully submitted your enrolment for the REGISTERED RETIREMENT SAVINGS PLAN, plan/policy # 61129.', 'Your enrolment confirmation number: 3953393614', 'Print or save a copy of [your summary](#) for your records.', 'If you have any questions, call Access Line at 1-800-724-3402, Monday to Friday, 8 a.m. to 8 p.m. ET.', and 'On our GRS Access website you'll find features and tools to help you monitor and manage your plan.' At the bottom of the page, there are two purple buttons: 'Enrol in another plan' with a circular arrow icon, and 'Sign out'.



Plan types > Contributions > Investments > Beneficiaries > **Submit**

Enrolment complete

You've successfully submitted your enrolment for the REGISTERED RETIREMENT SAVINGS PLAN, plan/policy # 61129.

Your enrolment confirmation number: 3953393614

Print or save a copy of [your summary](#) for your records.

If you have any questions, call *Access Line* at 1-800-724-3402, Monday to Friday, 8 a.m. to 8 p.m. ET.

On our GRS Access website you'll find features and tools to help you monitor and manage your plan.

[← Enrol in another plan](#) [Sign out](#)

Enrolment complete? Click Sign out

- Your plan administrator will approve your account
- You can now log in using the Access ID and password you created to manage your account online

We're here to help

mycanadalifeatwork.com

1-800-724-3402