

Direct your SAR

Go online and direct your **Rolls-Royce SAR** when it's convenient for you from **November 19, 2024, at 6 a.m. ET to December 5, 2024, at 4 p.m. ET.**

Put your Rolls-Royce SAR in your workplace plan. Here's how.

You get the opportunity to put your Stock Appreciation Right (SAR) directly in your workplace Registered Retirement Savings Plan (RRSP) with Sun Life. This could help you save on taxes and build your savings quicker!



Rolls-Royce

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We are happy to give you the opportunity to transfer all or part of your SAR to your workplace RRSP with Sun Life. If you wish to do so, you'll need to inform us of your intention between **6:00 a.m. ET on November 19, 2024**, and **4:00 p.m. ET on December 5, 2024**. Simply follow the step-by-step guide below.

Please note that:

- If there is no SAR payment, no money will be transferred to your RRSP.
- If you do contribute part of your SAR to your RRSP, your contributions will be counted on your 2024 tax return. Your RRSP tax slip will be available early in 2025 from Sun Life.

Before getting started, you'll want to have a few things available:

- your Sun Life sign-in ID and password (instructions follow, if you don't have these)
- your estimated SAR amount
- your Registered Retirement Savings Plan (RRSP) contribution limits

Now that you have all of the required information, let's get started.

There are 3 steps to complete

01.

Sign in to mysunlife.ca.

02.

Add the RRSP, if you haven't already.

03.

Tell us how much of your SAR is going to your RRSP.



STEP 1

Sign in to mysunlife.ca

Don't have a sign-in ID or password?

Go to mysunlife.ca, and select **Register**.

If we don't have your email on file, you can use your banking information to verify your identity.

If you forgot your sign-in ID and/or password, go to mysunlife.ca and select the appropriate links under **Having trouble signing in?**

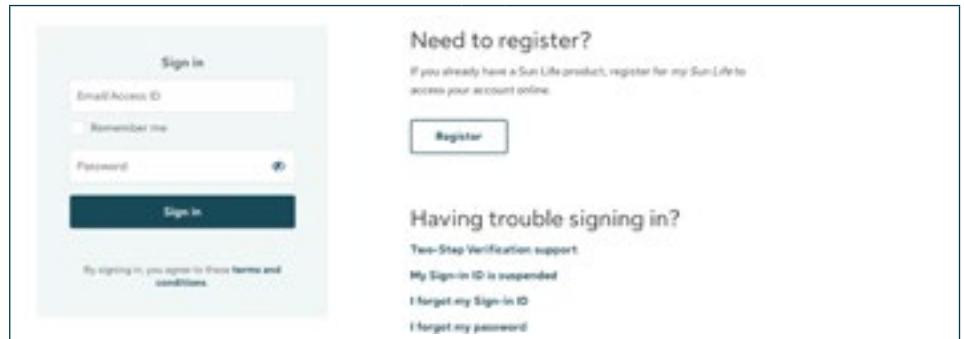
- Sign in to mysunlife.ca using your sign-in ID and password.
- On the **Home** page, you'll see a list of your Sun Life products.



If the RRSP is there, skip to **Step 3**.



If the RRSP is not there, and you want to contribute to it, proceed to **Step 2** to add it.



Important: you can enrol in the RRSP and direct your SAR on the same day if you do these tasks before 4 p.m. ET. If you enrol after 4 p.m. ET and sign out of mysunlife.ca, you will have to wait until the next business day to direct your SAR.

STEP 2

Add the RRSP if you haven't already

- On the **Home** page, select **Manage plan** and **my plan**. Then from the **Make a change** drop-down menu, select **Enrol in products**.
- Once you're on the page click the **Let's get started** button to begin.
- Follow the enrolment flow to personalize your contributions, investments and beneficiaries for the RRSP.

STEP 3

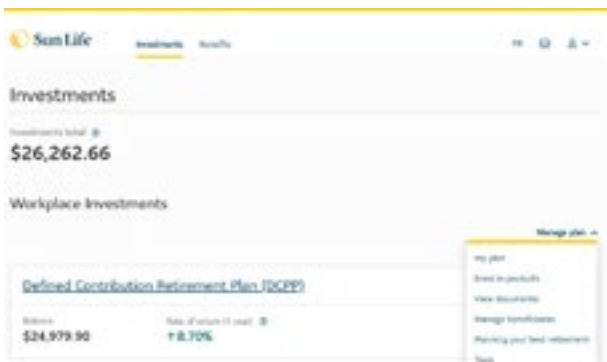
Tell us how much of your SAR is going to your RRSP

Give us your instructions between **6 a.m. ET on November 19, 2024**, and **4 p.m. ET on December 5, 2024**.

01.

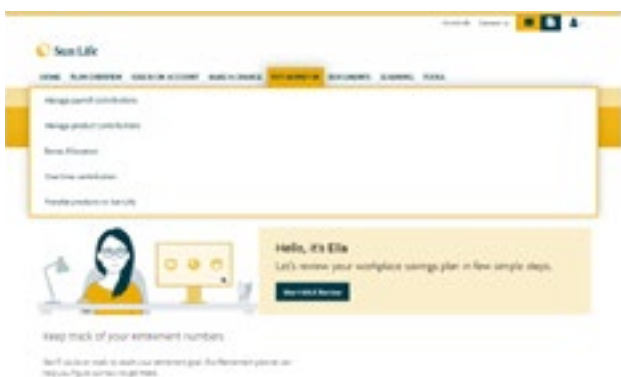
If you already added the RRSP, follow these steps to direct some of your SAR:

- Sign in to mysunlife.ca using your sign-in ID and password.
- On the **Home** page, select **Manage plan** and then **my plan**.



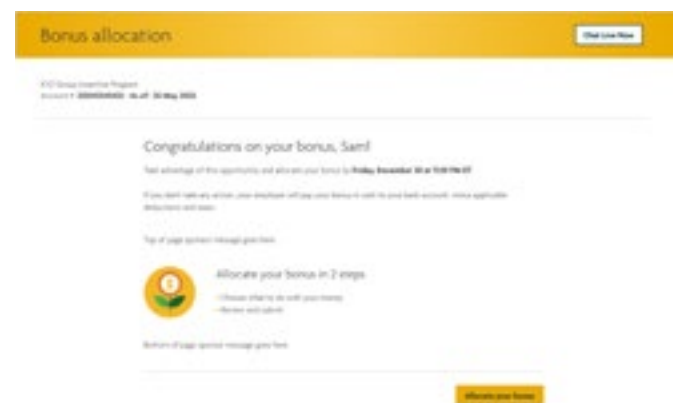
02.

At the top of the page, select **Put money in** then **Bonus allocation** from the drop-down menu.



03.

The next page shows the last day you can direct your SAR. To give us your instructions, select **Allocate your bonus**.





04.

- Choose to contribute either a dollar amount or a percentage of your SAR. There may be a minimum or maximum amount you can contribute.
- Enter the amount you wish to direct in the **Your allocation** box.
- You can add or change this amount any time before the bonus window closes.
- Select **Next**.

Bonus allocation Clear your choice

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Account # 228829925 As of 16 May 2022

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Choose what to do with your money

How you choose to allocate your bonus will affect your tax situation. Please consult your tax advisor for more information.

If you choose to allocate to RRSP or DCPP, you will need to verify your contribution limits with your tax advisor.

Note: You will receive your bonus allocation in whole dollars because our system only accepts whole dollars.

Registered Retirement Savings Plan (RRSP) <input type="radio"/> Select	Your allocation: \$ _____
Defined Contribution Pension Plan (DCPP) <input type="radio"/> Select Maximum: \$2000 per tax year	Your allocation: \$ _____
Tax-Free Savings Account (TFSA) <input type="radio"/> Select Important: You are not entitled to the product if you allocate to it. All TFSA money when you submit your allocations.	Your allocation: \$ _____
Cash <input type="radio"/> Select	Your allocation: \$ _____

Total allocated: \$0

Cancel Previous Next

05.

- Next you will see a confirmation screen, letting you know that the process is complete.
- Review your instructions. If you are ready, select **Submit**.
- Remember, you can change your bonus direction any time before the bonus window closes.

Note: It's important that you select **Submit** to finish the process. If you navigate away from this screen before selecting **Submit**, your choices won't be saved.

Bonus allocation Clear your choice

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Account # 228829925 As of 16 May 2022

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Review and submit

Take a moment to review your allocations.

We will credit your allocations according to your current selections on file for each product.

After you submit, you will receive text and change these allocations anytime until **Friday, December 30 at 11:59 PM ET**.

212 Group Incentive Program Allocation	Allocation (\$)
Registered Retirement Savings Plan (RRSP)	0.0000
Defined Contribution Pension Plan (DCPP)	0.0000
Cash	0.0000
Total	10.0000

Note: The exact amount of money paid out to each of your options will depend on how much your actual bonus amount is. Your employer determines the amount.

If your actual bonus amount is **higher** than what you've selected, the excess money will be paid to you in cash, minus applicable deductions and taxes. If it's **lower**, we'll divide the money proportionally between the options you've chosen.

Cancel Previous Submit

It's good to know

- Your SAR payment may be subject to applicable tax deductions and Canada/Quebec Pension Plan (CPP/QPP) and Employment Insurance (EI) deductions before it's deposited into your workplace RRSP. This means that even if you direct 100% of your SAR to the RRSP, you won't see 100% of it deposited. The contribution amount will be equal to the amount remaining, after mandatory deductions.
- It's your responsibility to make sure you have enough RRSP contribution room. To find your RRSP limit, check your most recent *Notice of assessment* from the Canada Revenue Agency (CRA). It will show your RRSP contribution limit for the current tax year.
- You can also find your RRSP contribution limit by going to **My Account for Individuals** on Canada.ca. Or call the Tax Information Phone Service at **1-800-267-6999**.
- If you contribute all or part of your SAR to your RRSP, you will receive a tax receipt to include with your tax return for the year.



We're here to help

Fast, mobile support

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

Visit us online

Sign in to mysunlife.ca for tools, articles and videos. Chat with us online for additional support.

Need to call us?

Call us at 1-866-881-0583, Monday to Friday, 8 a.m. to 8 p.m. ET.