



Here's how to get familiar with your UBC Faculty Pension Plan using mysunlife.ca/ubcfpp

After you sign in, under **Investments**, choose **Manage plan**, then **my plan**. The **my plan** page brings together your key account and financial planning information, all in one place. Here's what you'll find:

Retirement Income Estimator

Calculate the money you'll have in retirement and check if it aligns with your financial goals.

Good to Know

Lists the key financial planning tools and information available for your account.

The screenshot shows the 'my plan' dashboard for the UBC Faculty Pension Plan. At the top, there are navigation links: HOME, PLAN OVERVIEW, CHECK ON ACCOUNT, MAKE A CHANGE, DOCUMENTS, LEARNING, TOOLS. Below this is a yellow header with 'my plan' and 'my plan' text. The main content area includes:

- Learn more:** A section with a video thumbnail and a 'Watch the video' button.
- Register for a pension seminar:** A section with a seminar photo and a 'Learn more' button.
- Which investments are right for you?:** A section with a photo of people and a 'Learn more' button.
- What will my retirement income be?:** A section with a 'Calculate' button.
- Good to Know:** A section with links for 'Investment education', 'Read the Market Commentary', 'Stay up to date on Investment Changes', 'Read the latest issue of the UBC FPP Update newsletter', and 'Watch the 2023 Pension Forum Presentation'.
- Your account:** A section with a 'See past transactions in your account' link.
- Money for retirement:** A section showing 'FPP Account (FPP)' with a current balance of \$301,162.12 and a 'More about your FPP' link.

Your account

Displays the total amount of the savings in your FPP.



THE UNIVERSITY OF BRITISH COLUMBIA



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HOME PLAN OVERVIEW CHECK ON ACCOUNT MAKE A CHANGE PUT MONEY IN DOCUMENTS LEARNING TOOLS

Contact us



- Personal information
- Contact information
- Preferences
- Sign-in & security
- Sign out

Home > my plan

my plan

01. Plan overview

my plan

View available investments Click on a fund name for information from Morningstar®

Account fees

- Fund management fees
- Service fees

02. Check on account

Balances Summary / Details

View transaction history Summary / Details

View investment performance Summary / Details

Current asset mix Investment mix summary

Guaranteed investments

View accounts

Product details

03. Make a change

Change investments

Manage beneficiaries

04. Put money in

Contribute

Transfer registered plans to UBC FPP

05. Documents

- Statements
- Tax slips
- Forms

06. Learning

- my learning centre
- my money @ work guide
- Sustainable investing
- Glossary – Glossary of terms

07. Tools

- Asset allocation
- Retirement Income Estimator
- Tools & calculators

08. Profile

Access Info Managing your sign-in ID & password

- Personal Info**
- Personal information
 - Contact information
 - Preferences
 - Sign-in & security