

Welcome to the *Capital How To Series*. These documents are designed to help you through the set up process of your Group Savings Plan. From first time set up to scheduling your contributions this series will walk you through the steps and answer your questions.

As the experts in your Group Savings Plan, we are here to answer any extra questions and offer help along the way - connect with us!



How to...

Set up your Group Savings Plan Contributions

in your Capital Group RRSP, TFSA & RESP

Setting up recurring payments to your Group Savings Plan can help you save more and earn more*.

Here is the quick overview...

1. Go to www.mycanadalifeatwork.com and sign in.
If you're brand new, you'll need to click register and complete the registration set up first!
2. Select **Contributions** on the left side menu and then click **Add new** to set up a new contribution.
Here you will have 2 choices;
Pre-authorized: this is for recurring contributions (ex: monthly or bi-weekly).
Online banking: a great option for lump sum, or one time contributions, for example: at RRSP deadline.
3. Select one of the choices listed above and click **Get started** to begin.

The following pages in this document will walk you through the steps and provide a few helpful hints!

***PRO TIP:** Get the most out of compound interest with dollar-cost-averaging. Invest in your Group Savings Plan on a consistent schedule to average out the ups and downs of the market.

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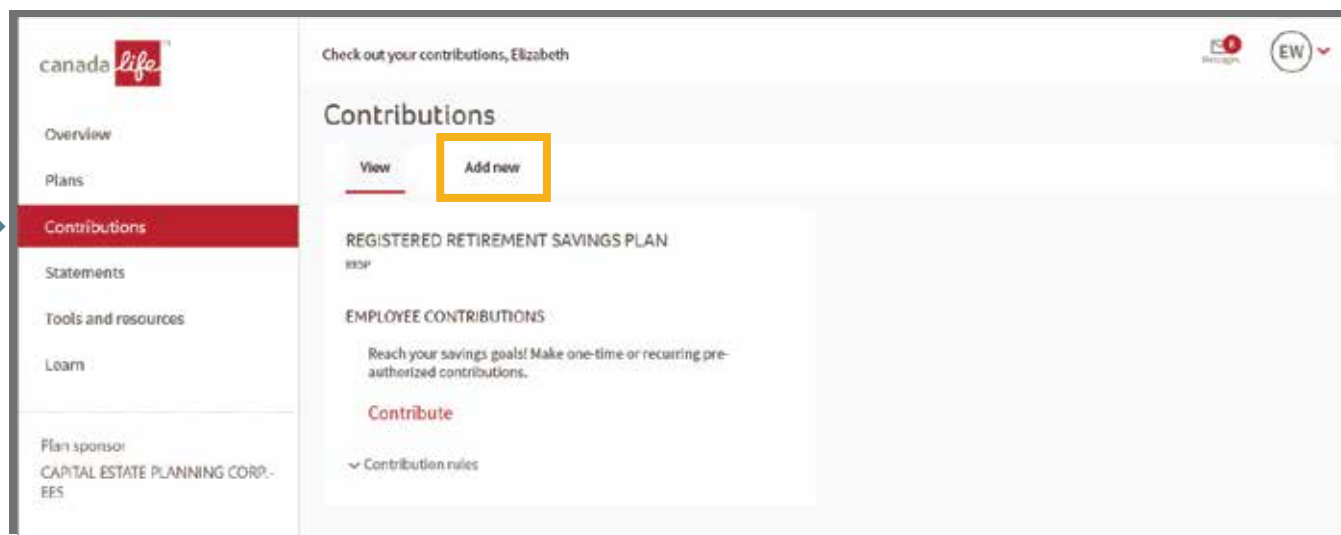
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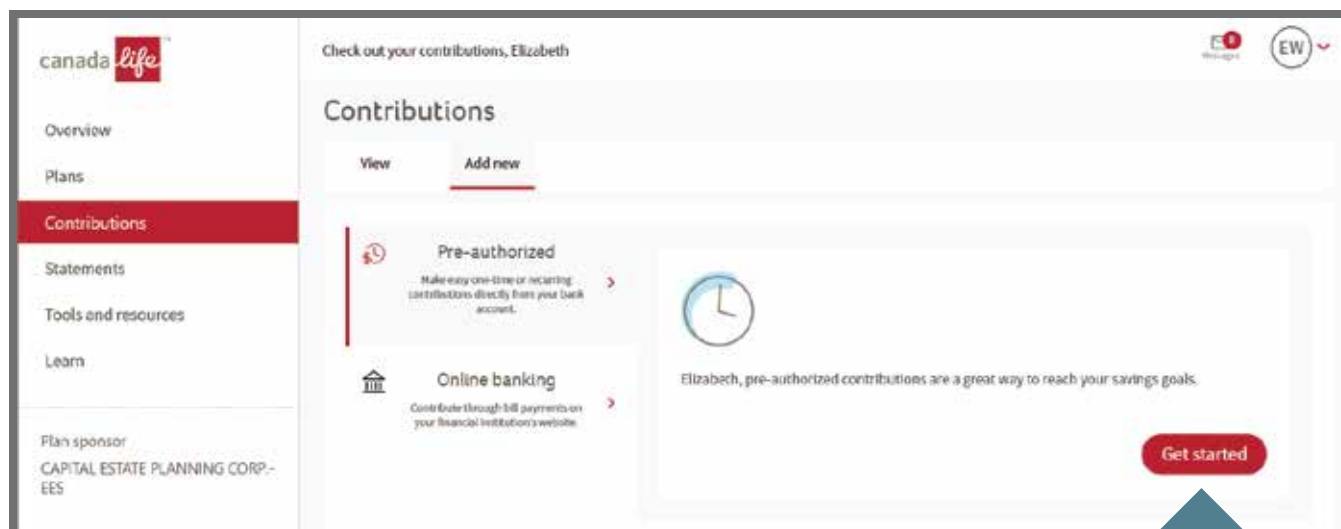
Step by step, we're here to help! Here are the steps to set up Pre-Authorized Contributions.

1. Go to www.mycanadalifeatwork.com and **sign in**.

2. Select **Contributions** on the left side menu and then click **Add new** to set up a new contribution.



3. Click **Get started** to begin setting up the pre-authorized contributions.



PRO TIP: Set up Pre-Authorized Contributions (PAC) on your own custom schedule and manage it through the www.mycanadalifeatwork.com portal.

4. Next step is to input your banking information.

You can either select your banking institution or manually type in the institution code, transit number and account number.

The screenshot shows the 'Contributions' section of the Canada Life website. The user is logged in as Elizabeth. The page has a sidebar with navigation options: Overview, Plans, Contributions (highlighted), Statements, Tools and resources, and Learn. Below the sidebar, it says 'Plan sponsor: CAPITAL ESTATE PLANNING CORP. EES'. The main content area is titled 'Contributions' and has two tabs: 'View' and 'Add new'. Under 'Add new', there are two options: 'Pre-authorized' (Make easy one-time or recurring contributions directly from your bank account) and 'Online banking' (Contribute through bill payments on your financial institution's website). The 'Add banking info' form is active, showing a selection of financial institutions (Bank of Montreal, Scotia, BNP, TD, CIBC, Other) and input fields for 'Financial institution code' (3 digits), 'Transit number' (5 digits), and 'Account number' (Up to 32 characters including hyphens). There are 'Cancel' and 'Save' buttons at the bottom.

5. Click **Save**. And you will see a confirmation message, read it carefully and click save again. After this, you will receive a confirmation email.

6. Now it is time to set up the details of your pre-authorized contributions.

Type and frequency of contribution

One-time: can be used for a lump-sum contribution

Recurring: can be set up on a weekly or monthly schedule

Select your start date

Select the amount you want to contribute

Click **Continue**. You will now see a message asking you to confirm the details.

And that's it! You're now well on your way to saving for your future through your group savings plan.

If you have questions regarding your plan, your investment choices or your savings goals - connect with us!

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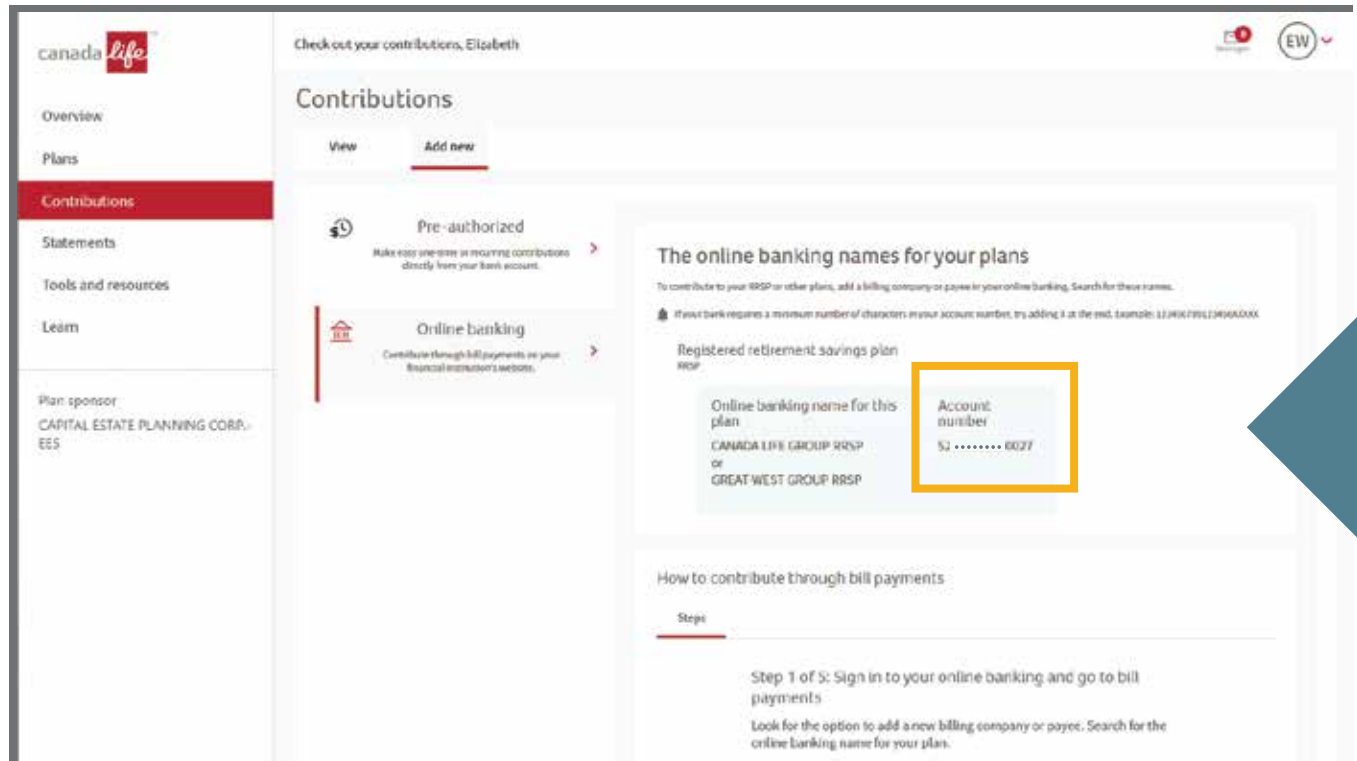
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Contributions via your online banking are a great way to do a lump sum deposit.

1. Once you have signed in and have clicked on the **Contributions** tab, to complete a lump sum deposit select **Online banking**.

To complete the transaction you will need to know your **account number** - this can be found on the first page of the online banking page (see the screen shot below).



2. Next you will need to sign in to your own **personal online banking** and create a new bill payment. From here you'll be searching for your plan (Canada Life Group RRSP) in the billing companies list.

3. Enter the account number and complete the set up for your lump sum deposit.

PRO TIP: Lump sum contributions are an excellent way to increase your RRSP contributions to help offset your taxes. When doing this, be aware that you're not exceeding your yearly contribution limits!

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