



Retirement-Ready Checklist

The following checklist will outline the steps you can take as you plan and transition to retirement.

- ☐ **Attend a full-day workshop** – You may attend one of these excellent full-day Financial and Pre-retirement Planning workshops if you are 45 years of age or older and considering retirement within the next ten years. This workshop covers the role of the Western pension, government pensions and private savings, as well as offering some practical information on lifestyle changes in retirement, investing, and tax planning.
 - [See dates for upcoming sessions and registration information](#)
 - You will also find helpful information in the [Western Retirement Guide](#)
- ☐ **Speak with a Western Human Resources representative** - If you have questions about your eligibility to retire, requirements for notifying Western of your retirement, post-retirement benefits at Western, or about phased retirement, Western Human Resources can assist. Call Human Resources at 519-661-2194 or email hrhelp@uwo.ca
 - Confidentiality: Your meeting is confidential. This will allow you to discuss possibilities and make a plan before you give official notice.
- ☐ **Check out the tools and resources available at sunlife.ca/western** – As a member of the Western Pension Plan, you have access to a wealth of tools, resources, articles, webinars and more available on sunlife.ca/western. Looking for something specific or have questions? Call the Sun Life Customer Care Centre at 1-866-733-8612 between 8 a.m. and 8 p.m. ET on any business day.
- ☐ **Attend a Sun Life Group Information Session** – Sun Life Financial is Western's preferred provider of a RIF program. The Sun Life Retirement & Savings Plan for Western Retirees is one option available to retirees who wish to begin receiving an income from their pension savings. Group information sessions will be held periodically on campus and you are also invited to [watch a recorded webinar](#) at your leisure. These sessions are well suited to those within two to five years of retirement, who want to better understand this option and all the benefits offered under the Sun Life Plan.
- ☐ **Attend a 1:1 meeting with a Sun Life Retirement Consultant** – If you are within five years of retirement and you are considering a move to the new Sun Life Plan, a Sun Life Retirement Consultant can meet with you in London, or via phone or teleconference. You can talk about your goals and investments, discuss whether you wish to bring spousal or outside assets into the plan, and perhaps begin the paperwork to make the move.

Questions about your pension?

Call the Sun Life Customer Care Centre at 1-866-733-8612 between 8 a.m. and 8 p.m. ET on any business day.

Other retirement related questions?

Contact Western Human Resources at 519-661-2194 or email hrhelp@uwo.ca