

THE CANADIAN BLOOD SERVICES DEFINED CONTRIBUTION PENSION PLAN

Pension Enrolment

Information Sheet – Next Steps: Investment Allocation

DC Pension Enrolment Process – Next Steps: Investment Allocation

Note: You are responsible for selecting your investment allocation and for sending the Investment Allocation and Transfer Form to Morneau Shepell. If you do not select an investment allocation, your contributions will be allocated to the default fund (see Investment Allocation and Fund Transfer Form).

Once you have completed the following Defined Contribution (DC) forms: Pension Enrolment; Declaration of Marital Status; Spousal Waiver – Pre Retirement Death Benefit (if applicable); and Declaration of Opting-in Common Law (Manitoba employees only and if applicable), and returned them to your local Employee Support Representative, you may go on-line (<https://cbs.hroffice.com>) to make your investment allocation selection.

You may access your on-line DC Pension Plan account 2 weeks after you have enrolled in the plan (i.e. you enrolled Feb 1, your on-line account will be ready by Feb 15th).

We encourage you to go on-line to make your investment allocation selections. However, you may complete the **DC Investment Allocation and Transfer Form** and fax (416 445-9948), email (cbspensions@morneaushepell.com) or mail it to Morneau Shepell (CBS Defined Contribution Pension Administration, c/o Morneau Shepell, 895 Don Mills Road, Suite 700, One Morneau Sobeco Centre, Toronto, Ontario M3C 1W3)

If you have questions, please contact your Employee Support Representative. You may find your Employee Support Representative by going to ABOUT You (<http://cbswdb001/EmployeePage/>), on the Canadian Blood Services' intranet.

Please follow the steps below to access your on-line DC Pension Plan account and make your investment selections. If you are having difficulty accessing your DC pension plan account on-line, please contact the Morneau Shepell Canadian Blood Services Pension Centre at 1-877-252-4442.

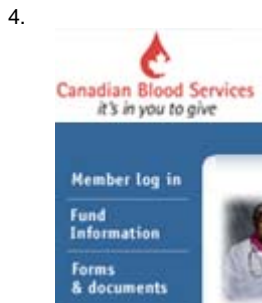
Accessing the DC Pension Plan Website and Member Account, and Obtaining More Forms

- Go to the DC Pension Plan Website from the intranet or internet (cbs.hroffice.com), or from ABOUT You on the intranet.

- Select [Defined Contribution Plan](#)

Defined Contribution Plan

- Select [Member log-in](#) on the top left hand side of the screen



- Type in your access code and password

- Your access code is your **employee ID**.
- Your initial password is your **employee ID** followed by your month and day of birth.

For example, the initial password for an employee with an ID number of 1234 and born on May 27 (05/27) will be 12340527.

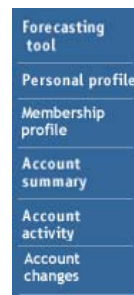
- Once you log in, the site will automatically prompt you to select a new password.
- Select **Log in**.

Access Code

Password

Login as an administrator

- Select **Account changes** on the left side of the screen.



- Select **Change Future Investment Allocations**. You may now make your investment allocation selection.

Account Changes

Transaction	Description
Automatic Rebalancing	Automatic transfer of assets to be in line with your investment mix.
Change future investment allocations	Modify the current investment mix for incoming contributions. Please note: this will not re-allocate funds which are already invested.
Transfer funds	Transfer assets between eligible funds by selling units of one fund and buying units of another fund.

- Under the "**Account Changes**" section, you may also set up automatic rebalancing on your account as well as transfer any assets between funds.

Obtaining More Forms

- Go to the DC Pension Plan website from the intranet or the internet (cbs.hroffice.com), or from ABOUT You on the intranet;
- Select **Defined Contribution Plan**;
- Select **Forms and Documents** (on left side of web-page).