ELIGIBLE EXPENSES FOR SUN LIFE'S PERSONAL SPENDING ACCOUNT

With Sun Life's enhanced Personal Spending Account (PSA), employees will benefit from a broad range of expenses in one inclusive list. This is a list of the eligible expenses available for the PSA.

Fitness services

- ☑ fitness club or gym memberships
- ☑ registration fees for fitness-related programs, lessons or courses (such as aerobics, yoga, dance and martial arts)
- ☑ sports team memberships and registration fees
- ☑ annual memberships or daily passes to athletic facilities (such as access to golf courses, racquet clubs and ski hills)
- ☑ personal trainers, fitness consultants, lifestyle consultants and exercise physiologists
- ☑ registration fees for fitness-related events (such as walks, runs and races)
- ☑ recreational activity fees (such as boating fees, camping fees and trail passes)
- ☑ fees for athletic facilities and equipment rental costs
- ☑ fitness-related apps, software and programs
- ☑ hunting and fishing licenses

Fitness equipment

- ☑ purchase or rental of exercise equipment (such as treadmills, exercise bikes, universal gyms and weights)
- ☑ specialized sports equipment (such as skates, bikes, non-motorized boats, rackets and clubs)
- ☑ fishing gear and supplies, camping gear, tents and sleeping bags
- ☑ jogging or cycling strollers
- ☑ specialized athletic footwear (such as running shoes, golf shoes and swim fins)
- ☑ fitness related apparel (such as running jackets, cycling shorts and swim caps)
- ☑ athletic safety equipment (such as helmets, eye protection and mouth guards)
- ☑ fitness tracking tools (including watches) and heart-rate monitors
- ☑ fitness consoles and accessories, DVDs and downloadable work-out videos

Health products and services

- ☑ weight management programs (excluding food)
- ☑ nutrition programs and counselling
- ☑ cholesterol and hypertension screening
- ☑ smoking cessation programs and products
- ☑ services provided by iridologists, herbalists, Chinese medical practitioners and acupressurists
- ☑ other alternative wellness services (such as Reiki, Rolfing and light therapy)
- ☑ stress management programs
- ☑ first aid and CPR (cardiopulmonary resuscitation) training
- ☑ health, fitness or lifestyle assessments
- ☑ vitamins and supplements, including herbal products
- ☑ sleeping aids (such as orthopaedic mattresses and pillows, darkening blinds, white noise machines and ear plugs)
- ☑ Medical alert products and services
- ☑ personal care items (such as heating pads, thermometers, sunscreen, teeth whitening kits and denture products)
- ☑ life coach services or fees for spiritual or wellness retreats (excludes the cost of travel and accommodations)
- ☑ cosmetic procedures (such as Botox, dermabrasion and tattoo removal)
- ☑ health-related apps, software and programs
- ☑ day-spa services (such as baths, saunas and aesthetic treatments)

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Education and personal development

- ☑ tuition fees for university, college or continuing education (including books and supplies)
- ☑ fees for language training and tutoring
- ☑ fees or dues for professional memberships or associated with maintaining a professional designation
- ☑ hobby or general interest classes and supplies (including cameras)
- ☑ personal computers, accessories and software
- ☑ online courses offered through a recognized educational institution requiring registration
- ☑ internet services (statements used as receipts must include the payment amounts and date)
- ☑ cultural activity passes or tickets (for things like museums, zoos, music concerts, plays, operas and symphonies)
- ☑ lessons, courses, seminars and conferences (including books, instruments, supplies and accessories)
- ☑ reading materials and book club memberships (including e-readers and books)
- ☑ finance related apps, software and programs
- ☑ smartphones and tablets

Green living

- ☑ public transit passes
- ☑ solar energy and wind energy products
- ☑ energy home audits, cost to upgrade windows, programmable thermostats and weather stripping
- ☑ lead pipe and asbestos removal from home
- ☑ composters, rain barrels, recycling bins and recycling fees for atypical items (such as electronics)
- ☑ appliances certified as energy efficient and other energy efficient products for home heating, cooling and lighting (such as tankless water heaters and compact fluorescent light bulbs)
- ☑ car or bike sharing memberships and usage fees (excluding fuel costs and repair fees)

Work-life balance

- ☑ childcare expenses
- ☑ elder-care expenses
- ☑ pet-care services (such as kenneling, obedience training, dog walking and veterinarian fees)
- ☑ domestic services (such as house cleaning, snow removal, landscaping and moving services)
- ☑ intelligent personal assistant (IPA) devices

Safety initiatives

- ☑ baby safety equipment
- ☑ first aid products (such as bandages, Automated External Defibrillators (AED) and disinfectant)
- ☑ smoke alarms, carbon monoxide (CO) detectors, fire extinguishers and fire escape ladders
- ☑ personal protective gear (such as safety boots, eye protection and safety gloves)
- ☑ life jackets, bear spray, rescue equipment and avalanche kits
- ☑ home security systems and associated fees

Professional services

- ☑ estate planning, financial investment counselling and tax return preparation
- ☑ legal expenses (such as wills, divorces, and house purchases or sales)

Insurance premiums

- ☑ Life and Critical Illness insurance premiums, as well as Long Term Care facility premiums
- ☑ pet insurance premiums

Financial

- ☑ Registered Retirement Savings Plan (RRSP) contributions
- ☑ Registered Education Savings Plan (RESP) contributions
- ☑ Tax-Free Savings Account (TFSA) contributions

Life's brighter under the sun

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