

## 2017 LiveBright Scholarship Program

### Terms and Conditions

There are five (5) scholarships, to be awarded by Sun Life Global Investments (Canada) Inc. (“SLGI”) this academic year (each, a “Scholarship”) available to senior high school or undergraduate students. Applicants must be planning to enroll or are already enrolled in full-time undergraduate study at an accredited two-year or four-year college, university, or vocational-technical school or equivalent post-secondary school in Canada for the entire upcoming academic year.

Preference will be given to applicants with a desire to pursue a career in business, the investment industry, or financial planning.

1. To be eligible for one (1) of the five (5) Scholarships, all applicants must:
  - Be Canadian citizens or permanent residents.
  - Provide proof of acceptance or enrollment in an undergraduate degree or diploma on a full-time basis\*

\*Students with a disability who attend university on a part-time basis because of their disability, please see section 17 below.

2. All applicants must submit:
  - A completed application form
  - Unofficial transcripts
  - One page flyer (PDF) with students’ best advice on personal finance and financial literacy (300-500 words)
  - An optional video (no longer than 1.5 minutes) explaining the applicant’s insights on their flyer. Video submissions must be in .mp4 format for eligible consideration.

If school enrolment or other supporting documentation is not submitted within the specified timeframe, the application may be subject to disqualification.

3. Each of the Scholarships shall be comprised of a lump sum payment to the winning applicants in the amount of \$2,000 CDN.

4. If you plan to attend a post-secondary program outside of Canada commencing in the Fall of 2017 as part of a year-abroad program you are still eligible to apply provided you are participating in an exchange program as part of your undergraduate course curriculum at a recognized publicly funded Canadian college or university and your degree is issued from a recognized publicly funded Canadian college or university.

5. Completed applications will be accepted between July 3, 2017, and September 30, 2017. Submissions must be mailed to: Sun Life Global Investments Marketing, 227 King Street South, Waterloo, Ontario, N2J 4C5, Suncode: 302A28, attn. Krista Seggewiss.

6. You may submit your application in either English or French. However, applications must be completed and submitted using a single language.

7. Application Evaluation Criteria:

All eligible applications will be reviewed by a team of appointed individuals at SLGI who will act as a judging panel (“Judging Panel”). The Judging Panel will be responsible for evaluating qualifying entries based on the following considerations/criteria:

- Academic performance, awards – 25%
- Extra-curricular activities, leadership and participation in school / community; work experience – 25%
- Desire to pursue a career in business, the investment industry, financial planning – 10%
- One page flyer with personal finance advice / video submission on financial literacy – 40%

Once applicants have been given weighted average scores based on the criteria, the Judging Panel will determine the winning applicants, which will not exceed five (5) candidates.

8. Potential Scholarship recipients will be required to sign a Declaration of Compliance, Publicity and Liability Release before being awarded a Scholarship. The signed declaration will include the recipient's consent to the use of their name, city and province or territory of residence and photograph, image, opinions, or likeness without further compensation, in any publicity carried out by SLGI in respect of the Scholarship program in social and traditional media.

9. Employees, directors, financial advisors, and officers of Sun Life Financial Canada and its subsidiaries, including SLGI (collectively “Sun Life”), and their children are not eligible for the Scholarships. A “child” shall be defined herein as a person whose parent or legal guardian is an employee, director or officer of Sun Life. If the parent of the child is a financial advisor in Sun Life’s Career Sales Force or an agent of Managing General Agencies, or a dealing or advising representative of a dealer that has a distribution agreement with SLGI, the child will not be eligible for the Scholarships.

10. SLGI reserves the right, in its sole discretion, to modify, amend (including extending the Scholarship application deadline) or cancel this Scholarship program at any time without individual notice.

11. By entering this Scholarship competition, you agree to be bound by these terms and conditions, the records of SLGI and the decisions of the Judging Panel, which records and decisions shall be deemed final, conclusive and binding in all matters.

12. You certify that all the information provided on the application form and in all the accompanying documents is true, accurate, and complete to the best of your knowledge. You understand that the provision of false information will render you ineligible for this Scholarship program.

13. By submitting this Scholarship application, you hereby authorize SLGI and its employees, agents, contractors and those of its affiliates to release any information provided in or relating to your Scholarship application to its representatives, the Judging Panel, or any members who need to know such information for purposes of administering and promoting this SLGI scholarship program. The judging panel will use the information only for purposes of evaluating your Scholarship application.

14. You authorize SLGI to collect, use, store and confirm information about you from you, your application, service arrangements you have made with or through SLGI, high school, college, university, government, or community sources, and from references you have provided to SLGI, in your application for the purposes of administering and promoting this Scholarship program. The information SLGI may collect, use, store and confirm includes, but is not limited to, personal evaluations, opinions, and transcripts.

15. You hereby authorize third parties, such as universities, government or community sources to release information required for the Scholarship to SLGI, for purposes of administering the Scholarship program. This information may include personal evaluations, verification that student information is correct and transcripts.

16. You understand and agree that SLGI will use information gathered in connection with Scholarship applications in aggregate and anonymous form to further its understanding of undergraduate students in general. The aggregate and anonymous information may also be used for the Scholarship program publicity or promotional purposes.

17. Students with a disability who attend post-secondary school part-time on the basis of their disability are also eligible to apply. Applicants must provide written documentation from their physician which indicates that the applicant's disability prevents them from attending school on a full-time basis. For the purposes of this Scholarship program, a disability is defined as "a functional limitation that is caused by physical, sensory or mental health impairment or learning disability that restricts a student's ability to perform the daily activities necessary to participate fully in post-secondary learning."

18. The definition of what constitutes "full-time" status is determined by the post-secondary institution being attended by the candidate in question.

19. Winning applicants will receive a tax slip in January or February of the following calendar year. Each winning applicant is responsible for determining their individual income tax implications.

20. Previous winners of LiveBright Scholarship Program are ineligible to win a second time.