

# insight

## TO BUILD INVESTMENTS THAT WORK

Sun Life Global Investments brings together the strength of one of Canada's most trusted names in financial services, Sun Life Financial, with some of the best asset managers from around the world to offer a lineup of innovative, world-class investment solutions.

With deep insight into plan member trends and investment behaviour, we have the resources to develop investment solutions to help your plan members reach their long-term financial goals.

### STRONG INVESTMENT CAPABILITIES

Through a rigorous research process, we identify and select asset managers who demonstrate a repeatable investment process and superior long-term performance.

Risk management is key to all our investment decisions and we adhere to strict investment guidelines. By having multiple layers of oversight, we strive to ensure our investment solutions – and the funds they invest in – are managed according to their investment objectives.

### A COMMITMENT TO SERVICE EXCELLENCE

Sun Life Global Investments is dedicated to providing best-in-class investment solutions and quality service to our clients.

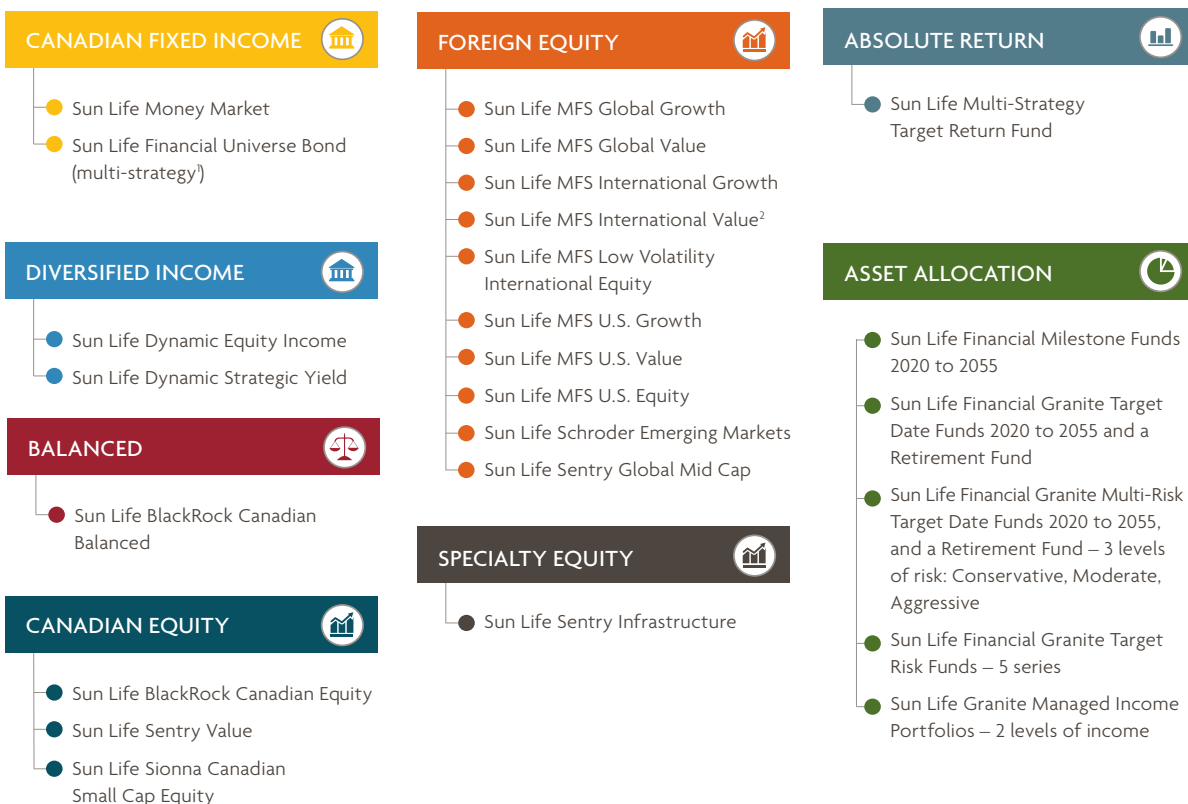
In collaboration with Sun Life Financial Group Retirement Services, plan sponsors and their members will benefit from seamless implementation, ongoing support through member education, and tools that will help plan members make informed investment decisions when planning for their future.

### Sun Life Global Investments at a glance

- Head office in Toronto, Ontario
- Over 125 asset manager relationships worldwide through Sun Life's International Investment Centre
- Access to research from over 4,000 asset managers worldwide
- 26 investment options available to plan sponsors
- Both sub-advised and in-house managed investment solutions available

Sun Life Global Investments offers a variety of both in-house and sub-advised investment options available through Sun Life Financial Group Retirement Services to meet the needs of all your plan members.

## OUR INSTITUTIONAL PLATFORM



<sup>1</sup> Effective May 2, 2016, the Sun Life Financial Universe Bond Fund moved to a multi-strategy structure. The Fund's assets will be allocated amongst four underlying managers: BlackRock Asset Management; Connor, Clark & Lunn Investment Management Ltd. (as sub-advisor); Franklin Templeton Investments and Philips, Hager & North Investment Management.

<sup>2</sup> Closed to new plans, effective January 28, 2016.

### Contact us to learn more about how Sun Life Global Investments can complement your offering:

- ▶ **Stian Andersen**  
Director, Institutional Business Development  
Western Canada  
403.263.9597  
stian.andersen@sunlife.com
- ▶ **Pat Leo**  
Director, Institutional Business Development  
Ontario  
416.408.7274  
pat.leo@sunlife.com
- ▶ **Anne Meloche**  
Regional Vice-President,  
Institutional Business  
Quebec and Eastern Canada  
514.866.6287  
anne.meloche@sunlife.com

Sun Life Financial Group Retirement Services offers plan sponsors and their members a lineup of segregated funds. These are established in accordance with the Insurance Companies Act (Canada) and may contain securities of mutual or pooled funds managed by various investment managers, including Sun Life Global Investments (Canada) Inc. or the segregated funds may hold securities that are invested on a sub-advisory basis by investment managers including Sun Life Global Investments (Canada) Inc. Management fees and expenses are associated with segregated funds and will be disclosed to you by Group Retirement Services. Mutual fund and segregated fund performance is not guaranteed; their values change frequently and past performance may not be repeated.

Sun Life Global Investments (Canada) Inc. is a member of the Sun Life Financial group of companies.  
© Sun Life Global Investments (Canada) Inc., 2016.

[www.sunlifeglobalinvestments.com/institutional](http://www.sunlifeglobalinvestments.com/institutional)

FOR INSTITUTIONAL USE ONLY

810-4118-07-16

