

SUN LIFE **MFS DIVERSIFIED STRATEGIES**

Guarantees, growth potential, low cost

ADVISOR BROCHURE

ADVISOR USE ONLY



Sun Life MFS Diversified Strategies¹

Investors expect more. Growth potential. Reputable asset managers. Lower costs. Insurance Benefits and Guarantees to protect from severe downturns.

Introducing Sun Life MFS Diversified Strategies

Utilizing the strength of MFS Investment Management, we are offering five core, lower-cost segregated fund strategies. Each of the five strategies offers growth potential and diversification, with a blend of styles within each fund. The segregated fund insurance contract provides an extra layer of protection.

Built for investors who want:

- Growth potential and diversification with the option of pure equity mandates
- Carefully constructed strategies designed to provide long-term value from one of the most trusted and successful sub-advisors, MFS Investment Management
- Insurance benefits including estate planning advantages and guarantees to help protect in down markets

All with highly competitive fees.



**\$100,000
minimum initial
investment
per fund**

Balanced
Canadian Equity
U.S. Equity
International Equity
Global Equity

¹Available in Sun GIF Solutions Investment Series.

Why choose MFS²?

Let's start at the beginning.

In 1924, MFS created the first U.S. open-end mutual fund, making professionally managed, cost effective investments more accessible. Since its founding, the company has guided investors through boom times and recessions – experiencing every kind of market that an asset manager can experience. The key lesson: they are never finished building. Today, through a vast global network and a long-term, collaborative approach, teams at MFS continue to explore global opportunities while digging deeper into regional markets. The shared goal is to bring the best ideas and innovative solutions to investor portfolios.

MFS' Investment Process – The Three Pillars

MFS' sole purpose is to create long term value by allocating capital responsibly. This purpose is supported by three pillars:



COLLECTIVE EXPERTISE

Global Collaboration
Integrated Research
Unique Compensation



LONG-TERM DISCIPLINE

Time is an asset



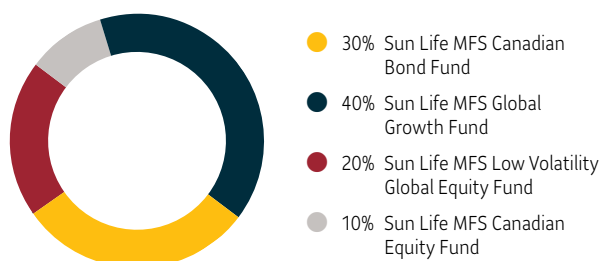
ACTIVE RISK MANAGEMENT

Rigorous and continuous
risk review process

²MFS Investment Managers are the sub advisors for the underlying mutual funds held within the Sun Life MFS Diversified Strategies.

Introducing Sun Life MFS² Diversified Strategies

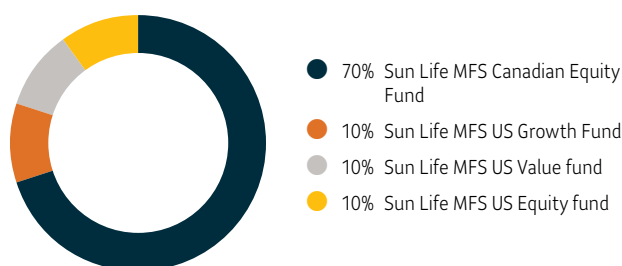
Sun GIF Solutions MFS Diversified Balanced



Why invest:

- A style-diversified balanced strategy with a target mix of 70% equities and 30% fixed income
- Offers exposure to Canadian and global equities, including low volatility strategies
- Adds exposure to a core foundation of Canadian bonds for stability

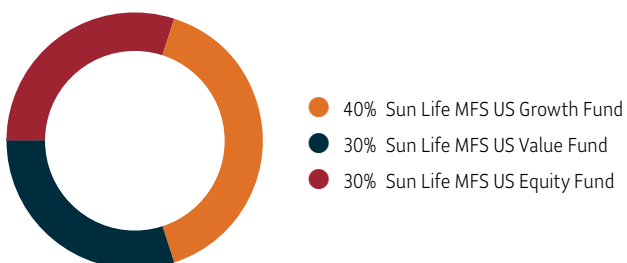
Sun GIF Solutions MFS Diversified Canadian Equity



Why invest:

- A Canadian-focused equity strategy that aims to provide long-term capital growth
- Offers exposure to core Canadian equities and dividend-yield oriented companies
- Focuses on quality companies, with a tilt to mid-cap and large-cap companies
- Invests predominantly domestically

Sun GIF Solutions MFS Diversified U.S. Equity

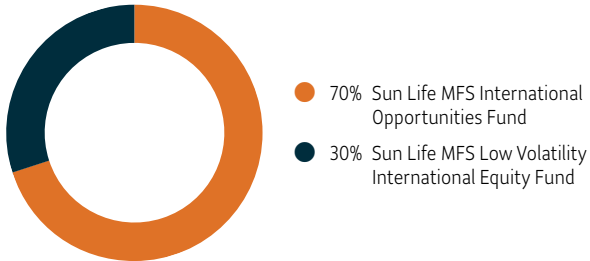


Why invest:

- A style-diversified U.S. equity strategy that aims to provide long-term capital growth
- Offers diverse exposure to core, growth and value-oriented U.S. companies
- Seeks out quality companies with sustainable growth potential, while being mindful of risk

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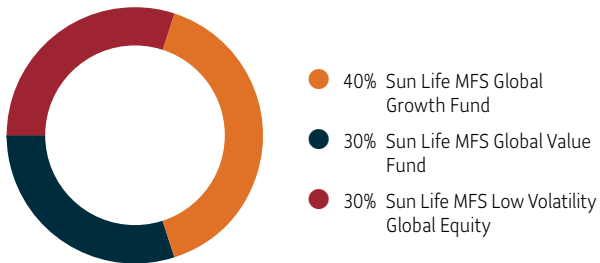
Sun GIF Solutions MFS Diversified International Equity



Why invest:

- An international equity strategy that aims to provide long-term capital growth
- Predominantly invests in large cap, high quality companies located in international markets, including emerging markets
- Adds low-volatility global equity exposure for added stability and protection potential

Sun GIF Solutions MFS Diversified Global Equity



Why invest:

- A global equity strategy that aims to provide long-term capital growth
- Invests in companies located anywhere in the world, offering exposure to core, growth, and value-oriented companies
- Focused on quality, it provides exposure to larger companies with above average growth prospects and to undervalued businesses
- Adds exposure to low-volatility strategies for added stability and protection potential

Why Segregated Funds?

Sun Life MFS² Diversified Strategies¹



**Peace of
mind**



**Time
savings**



**Competitive
pricing**

- The ability for the death benefit value to bypass probate and seamlessly transfer to beneficiaries, saving time and simplifying the estate settlement process.
- Potential to reduce probate fees³ associated with settling the total estate.
- **Maturity and death benefit guarantees⁴ – to provide an extra layer of certainty.**
- Potential creditor protection, to protect personal assets from professional liabilities, providing extra protection for business owners.
- Competitive pricing.

¹Available in Sun GIF Solutions Investment Series.

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³Probate, executor, accounting, and legal fees may vary by province.

⁴Withdrawals affect the value of contract guarantees.

Fund codes and MERs

- \$100,000 minimum initial investment per fund; \$100 subsequent deposits per fund.
- Four sales charge options to choose from.
- Competitive pricing.

Sun Life MFS Diversified Strategies – Investment Series

Name	Fund Manager	FEL/ Charge back MER ⁵	FEL fund code	CB fund code	F class MER	F class fund code	O class MER ⁶	O class fund code	Risk rating
Sun GIF Solutions MFS Diversified Balanced	Sun Life Assurance Company of Canada	2.23	SI194	SI794	1.07	SI694	0.47	SI594	low-to- medium
Sun GIF Solutions MFS Diversified Canadian Equity	Sun Life Assurance Company of Canada	2.35	SI195	SI795	1.20	SI695	0.55	SI595	medium
Sun GIF Solutions MFS Diversified U.S. Equity	Sun Life Assurance Company of Canada	2.42	SI196	SI796	1.32	SI696	0.47	SI596	medium
Sun GIF Solutions MFS Diversified International Equity	Sun Life Assurance Company of Canada	2.40	SI197	SI797	1.31	SI697	0.54	SI597	medium
Sun GIF Solutions MFS Diversified Global Equity	Sun Life Assurance Company of Canada	2.34	SI198	SI798	1.29	SI698	0.56	SI598	low-to- medium

⁵MERs are as of December 31, 2023.

⁶The MER for O class does not include management fees or the advisor service fee, which are both paid by the redemption of units from the contract.

About Sun Life Global Investments

Sun Life Global Investments offers Canadians a diverse lineup of mutual funds, portfolio solutions and guaranteed investments, empowering them to pursue their financial goals at every life stage. We bring together the strength of one of Canada's most trusted names in financial services with some of the best asset managers from around the world to deliver a truly global investment platform. For more information, please visit sunlifeglobalinvestments.com or follow us on Twitter @SLGI_Canada.



For more information, contact your Wealth Sales Team or:

Visit **sunlifeglobalinvestments.com** | Call **1-844-753-4437**

Email **supportwealth@sunlife.com**

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Sun Life Global Investments is a trade name of SLGI Asset Management Inc., Sun Life Assurance Company of Canada and Sun Life Financial Trust Inc.

Sun Life Assurance Company of Canada is the issuer of guaranteed insurance contracts, including Accumulation Annuities (Insurance GICs), Payout Annuities, and Individual Variable Insurance Contracts (Sun Life GIFs). Any amount that is allocated to a segregated fund is invested at the risk of the contract owner and may increase or decrease in value.

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