

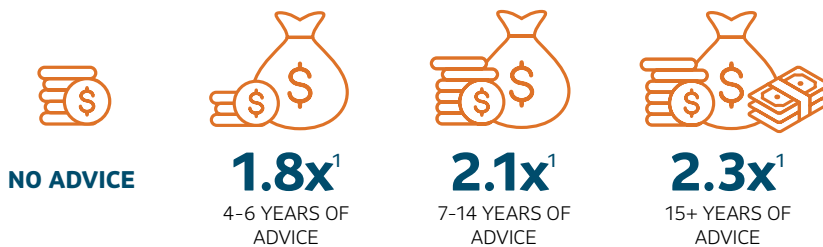
Working with an advisor: a valuable partnership

Advice is the cornerstone of informed decisions.

Evidence demonstrates that Canadians who work with a professional advisor accumulate significantly more wealth, and are more prepared for retirement and unexpected events.

Build your net worth

An advisor can help you plan how to invest your savings, and build toward your future goals and needs.



62%

of Canadians with an advisor are satisfied with how much they've saved for retirement²

Canadians with an advisor accumulate over **2x** more assets over time³

Advisors may help you stay on track

An advisor may help to protect your income and lifestyle from unexpected events while avoiding emotional investing habits.

Canadians who partner with an advisor:

82% say they have better investing habits⁴



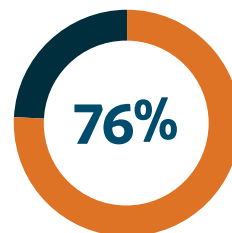
80% say their advisor helps them save⁵

More than 2X as likely to have at least one year's worth of expenses to fall back on⁶

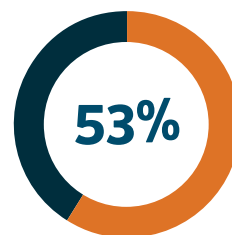


Advisors may help you gain more confidence

An advisor's professional advice may play a key role in giving you confidence in your plan.



of those working with an advisor report having a **positive sense of well-being**⁷



said financial stress does not impact their life vs. 37% without an advisor⁸

Sources: ¹More on the value of financial advisors. Claude Montmarquette and Alexandre Prud Homme, Cirano 2020. The average household with a financial advisor for 15 years or more has asset values 2.3x higher than an average comparable household who did not have a financial advisor. | ²2019 Sun Life Barometer study | ³More on the value of financial advisors. Claude Montmarquette and Alexandre Prud Homme, Cirano 2020 | ⁴Pollara Research Strategic Insights 2020 | ⁵Canadian Investors' Perceptions of Mutual Funds and the Mutual Fund Industry, Pollara 2019 | ⁶The tale of two pandemics, FP Canada, March 2021 | ⁷BlackRock Global Investor Pulse, 2019 | ⁸FP Canada, Financial Stress Index, July 2020

Talk to an advisor today about how they can help you meet your investment goals.

Get to know the Sun Life group of companies better

Sun Life Global Investments benefits from the strength of Sun Life's asset management capabilities:

- \$1 trillion+ in assets under management globally
- 150+ years of helping Canadians grow and protect their wealth
- Sun Life's scale means pricing power and a broad global reach
- Our insurance roots instill a strong risk management culture
- Our portfolio management team engages Sun Life's manager research engine, the International Investing Centre, to provide research when sourcing new mandates
- We make institutional mandates available to individual investors



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