



SUN LIFE
**PRIVATE
INVESTMENT
POOLS**

SEGREGATED FUNDS

**BUILT TO PROTECT
YOUR FUTURE**



Sun Life
Global Investments

Designed Differently. Built to Protect your Future.

Sun GIF Solutions Private Investment Pools Segregated Funds were launched to help you achieve your financial goals, provide an element of protection - and invest for the future you dream of.

The underlying investments are:

- Uniquely engineered to diversify your portfolio and reduce risk, while still offering growth potential.
- Exclusive access to solutions from active, world-class sub-advisors.
- Competitively priced.
- Maturity and death benefit guarantees to help protect against market volatility.

Sun GIF Solutions Private Investment Pools Segregated Funds

Sun Life Private Investment Pools² are strategically designed investment solutions to help you meet your financial goals. Combine them with the guarantees and the additional insurance benefits of Sun GIF Solutions contracts and they can help you build for your future.

	For investors looking for a...	Asset Class	Investment Risk	Sub-advisor
Sun GIF Solutions Sun Life Core Advantage Credit Private Pool	Well-diversified, North American, core, investment-grade fixed income portfolio	North American fixed income	Low	SLC Management
Sun GIF Solutions Sun Life Global Tactical Yield Private Pool	Globally diversified balanced portfolio with exposure to alternative asset classes	Tactical balanced	Low	SLGI Asset Management Inc.
Sun GIF Solutions Sun Life Global Dividend Private Pool	Core global dividend solution that has attractive upside potential while offering protection on the downside	Global equity	Low to medium	KBI Global Investors
Sun GIF Solutions Sun Life Real Assets Private Pool	Diverse portfolio of listed real assets, including: infrastructure, REITs, and natural resources	Global equity	Low to medium	<ul style="list-style-type: none"> • MFS Investment Management • Lazard Asset Management • KBI Global Investors

²SLGI Asset Management Inc. is the manager of the Sun Life Private Pools mutual funds which are the underlying investments in Sun Life GIF Private Investment Pools segregated funds.

Sun GIF Solutions Segregated Fund Contract Offers:

Named Beneficiaries

Sets up the estate settling process for success, removing the guesswork and assets will be distributed efficiently and according to your wishes.

Death Benefit Guarantees¹

Protection of assets, with the beneficiary receiving the guaranteed amount or the market value, whichever is greater.

Maturity Guarantees¹

Protection for your assets, at contract maturity you will receive the market value or 75% of all deposits, whichever is greater.

Bypass Probate and other fees

Ability to bypass the estate, so that proceeds can pass quickly and privately to beneficiaries without legal, estate administration and probate fees.

Potential Creditor Protection

Assets may be protected from seizure by creditors.

Sun GIF Solutions Private Investment Pools

Built to protect Clients' future

Available in two guarantee options, depending on your specific needs:

Sun GIF Solutions Investment Series

- A valuable savings option with guarantees at a fair price
- Investors looking for growth potential, as well as protection

Sun GIF Solutions Estate Series

- Investors looking for growth potential, protection and estate planning solutions
- 100% death benefit guarantee
- Annual Resets of the Death Benefit Guarantee to age 80

¹Guarantees are reduced proportionally for withdrawals.

A Powerful Partner in a World of Uncertainty

Sun GIF Solutions Private Investment Pools underlying investments bring together a unique collection of strategically selected world-class sub-advisors with deep institutional experience, proven track records and risk management expertise.



- Established in 1980
- Manages €9B² across an institutional, globally diverse client-base (UK, Europe, North America and Asia)
- A pioneer in Natural resource equity investing since 2000
- A strong commitment to environmental, social and governance (ESG) investing, managing ESG strategies for more than two decades



- A history tracing back to 1848; early origins in banking and foreign exchange
- Locations in 23 cities across 16 countries with more than 340 investment personnel
- Manages US\$222.9 billion²
- Known for a global view on investing and vast experience with global, regional, and domestic portfolios



- Established in 1924
- One of the oldest asset management companies in the world; ranked as the 26th largest US money management firm² and 10th largest U.S. mutual fund manager³
- Acquired by Sun Life in 1982
- With nearly a century of active management experience, MFS has demonstrated an unwavering commitment to finding the best, most durable investment opportunities for clients in the years ahead



- A global institutional asset manager with \$227 billion in assets and more than 800 institutional clients⁴
- Deep expertise in fixed income (public, private and real estate debt)
- A team of 40 investment professionals dedicated to public fixed income



- Established in 1928
- One of the largest asset managers in the world, with more than US\$1.1 trillion in assets under management
- More than 750 investment professionals—240 dedicated to fixed income

²Based on March 31, 2020, data.

³Strategic Insight, as of December 31, 2018.

⁴As of September 30, 2019.

To learn more visit sunlifegifs.ca/sungifssolutionsprivateinvestmentpools

Get to know the Sun Life group of companies better

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

- CAD \$1 trillion+ in AUM globally
- 50+ years helping Canadians grow and protect wealth
- Our scale means pricing power and a broader global reach
- Insurance roots instil a strong risk-management culture
- SLGI's portfolio management team engages Sun Life's manager research engine, the International Investing Centre, to provide research when sourcing new mandates
- SLGI makes institutional mandates available to individual investors

About Sun Life

Sun Life is a leading international financial services organization providing insurance, wealth and asset management solutions to individual and corporate Clients. Sun Life has operations worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China, Australia, Singapore, Vietnam, Malaysia and Bermuda. Sun Life has total assets under management of \$1.1 Trillion December 31, 2019⁴. For more information please visit www.sunlife.com.

⁴June 30, 2019.

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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