

# SUN LIFE **MFS DIVERSIFIED STRATEGIES**

Built on a strong foundation to help build for your future



# Sun Life MFS Diversified Strategies (Investment Series)

## Growth, Diversification, and great Value

You've worked hard to achieve your financial goals. And you always are looking for opportunities that can best suit your investing needs.

Opportunities for investing can be found all over the world, markets have become more complex, keeping up is a full-time job.

## Sun Life MFS Diversified Strategies can help you reach your financial goals.

The Sun Life MFS Diversified Strategies segregated funds are five distinct strategies, each offering a unique blend of investments opportunities. Each is a carefully selected combination of funds designed to provide long-term value and diversification. And when combined with the benefits and guarantees of the segregated fund insurance contract, give that extra layer of protection and peace of mind you may be looking for.

**All at an attractive price point.**

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# The MFS<sup>1</sup> Investment Management Story – Fund Management is Key

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.

## Investment and Relationship Management **worldwide**

MFS has offices in nine countries, responsible for everything from research to operations. Intelligence gathered through deep-rooted global networks and established over decades is put to work for investors.

**As of July 31, 2021, MFS managed more than CAD \$858.4 billion on behalf of investors everywhere.**








<sup>1</sup>MFS Investment Management are the investment managers for the underlying mutual funds held within the Sun Life MFS Diversified Strategies.

# Our Strategies



## Sun Life MFS<sup>1</sup> Diversified Strategies

Fund name	For Investors looking for;	Asset Class	Investment Risk
 <b>Sun GIF Solutions MFS Diversified Balanced</b>	Well-diversified balanced portfolio (70% equity/30% fixed income), investing in Canadian, U.S. and Global equities, along with fixed income.	Balanced	Low-to-medium
 <b>Sun GIF Solutions MFS Diversified Canadian Equity</b>	Canadian portfolio focusing on dividend paying and long-term growth companies in Canada and to a lesser extent, investments outside of Canada.	Canadian equity	Medium
 <b>Sun GIF Solutions MFS Diversified U.S. Equity</b>	Well diversified U.S. equity portfolio, investing in quality U.S. companies, focusing on growth while offering protection on the downside.	U.S. equity	Medium
 <b>Sun GIF Solutions MFS Diversified International Equity</b>	Diverse international equity portfolio investing in growth and value-oriented companies outside of Canada and United States.	International equity	Medium
 <b>Sun GIF Solutions MFS Diversified Global Equity</b>	Diverse global equity portfolio investing in quality global companies, focusing on growth while offering protection on the downside.	Global equity	Low-to-medium

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# Why a Segregated Fund?

## 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 Client's wishes.

### **Death Benefit Guarantees<sup>2</sup>**

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

### **Maturity Guarantees<sup>2</sup>**

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

### **Bypass Probate and other fees<sup>3</sup>**

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.

**As an insurance contract, both RRSP AND non-registered assets can bypass the probate<sup>3</sup> process.**

Talk to your advisor today about how **Sun Life MFS Diversified Strategies** can help you on the path to reaching your financial goals.

<sup>2</sup>Withdrawals affect the value of contract guarantees.

<sup>3</sup>Probate, executor, accounting, and legal fees may vary by province.

## 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](https://sunlifeglobalinvestments.com) or follow us on Twitter @SLGI\_Canada.



For more information, speak to your advisor or:

Visit [sunlifeglobalinvestments.com](https://sunlifeglobalinvestments.com) | Call **1-844-753-4437 (1-844-SLF-GIFS)**

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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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