

Introducing SunWise Elite Bundles

SunWise® Elite Plus

Rethinking Retirement Planning

Maximize your clients' equity exposure

SunWise Elite Bundles are based on a portfolio strategy that combines one or two equity funds with an income fund to maximize the growth potential of your clients' investment in SunWise Elite. Every month, the Bundles are rebalanced to provide the maximum 70% equity exposure permitted within the contract. Unlike other managed solutions, where asset allocation is performed at the fund level, we rebalance based on the securities in each underlying fund.



managed by CI Investments Inc.



issued by Sun Life Assurance Company of Canada

All equity funds hold a certain amount of cash. With SunWise Elite Bundles, we consider the cash in the equity fund to be part of the fixed-income weighting. That means that there is no duplication of income assets and no cash drag on the Bundle.

For example, Harbour Fund, a Canadian equity fund, has in the past held high levels of cash, depending on the manager's view of the opportunities available in the market. If the cash level was 30%, the entire Bundle would be invested in Harbour with nothing invested in the income fund. If there was no cash in the equity fund, the Bundle's allocation would be 70% to Harbour, and 30% to the income fund. The fund allocation of the Bundle mix is determined by the underlying security allocation of the equity fund(s).

You benefit because

- we monitor and rebalance your clients' investments within each Bundle, allowing you to focus on other parts of your business, and
- compensation is the same as provided by an equity fund.

Your clients benefit because

- they are always fully exposed to the higher growth potential of equities, and
- they have access to some of the best portfolio managers in Canada – Gerry Coleman, Harbour Advisors; Eric Bushell, Signature Global Advisors; Alan Radlo, Cambridge Advisors; Dynamic Funds; and Fidelity Investments.



For more information go to www.sunwiseeliteplus.com