MySunLifeGIFs

USER GUIDE

ADVISOR USE ONLY

Sun Life Global Investments

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User Guide for MySunLifeGIFs

MySunLifeGIFs is an industry-leading online tool that can help you efficiently monitor and manage **Sun Life Guaranteed Investment Funds (GIFs)** Client portfolios. This reference guide highlights the key functions and benefits of MySunLifeGIFs to help you maximize your user experience with this tool.

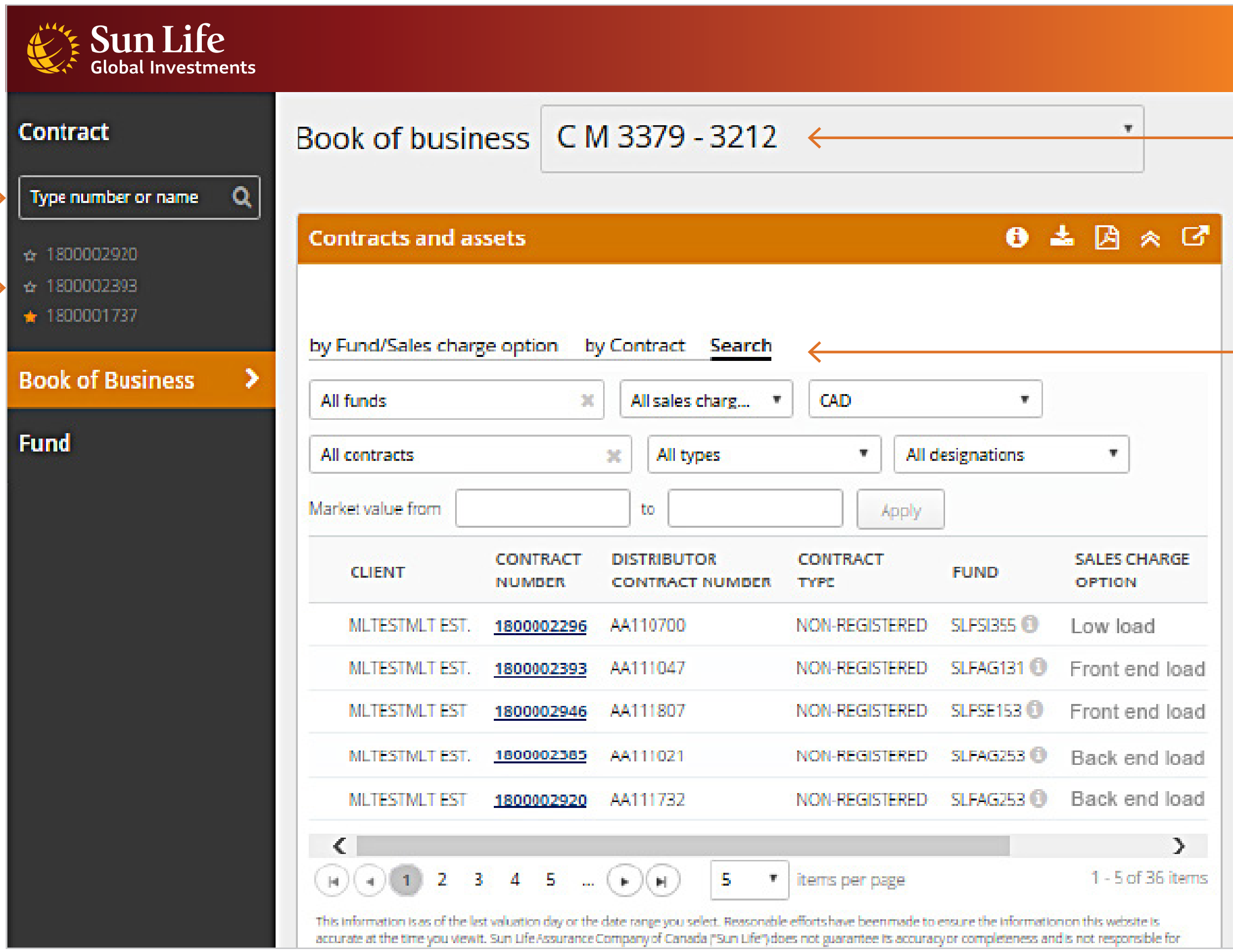
Key features at a glance:

- Search Client information by name, fund, or contract
- Search for settled or unsettled transactions
- Toggle between different rep codes
- Generate reports according to your needs and export to portable document format (PDF) and comma separated value (CSV)
- View and print duplicate statements, confirmations, and tax slips
- View contract details, including owner, annuitant, and beneficiary information
- View recently searched items and save favourites
- View real time pending trade details
- View sales and servicing commissions
- Arrange column data in ascending or descending order, according to your preference
- View fund information, including current and historic unit values
- View the approximate deferred sales charge (DSC) for a fund if redeemed
- View guarantee series and guarantee levels
- View systematic plans and banking information

Advisor view

Assets, reports and features

When viewing information at an advisor or book of business level, headings on screen will appear in orange. Fund details (in the left navigation under "Book of business") appear in dark blue.



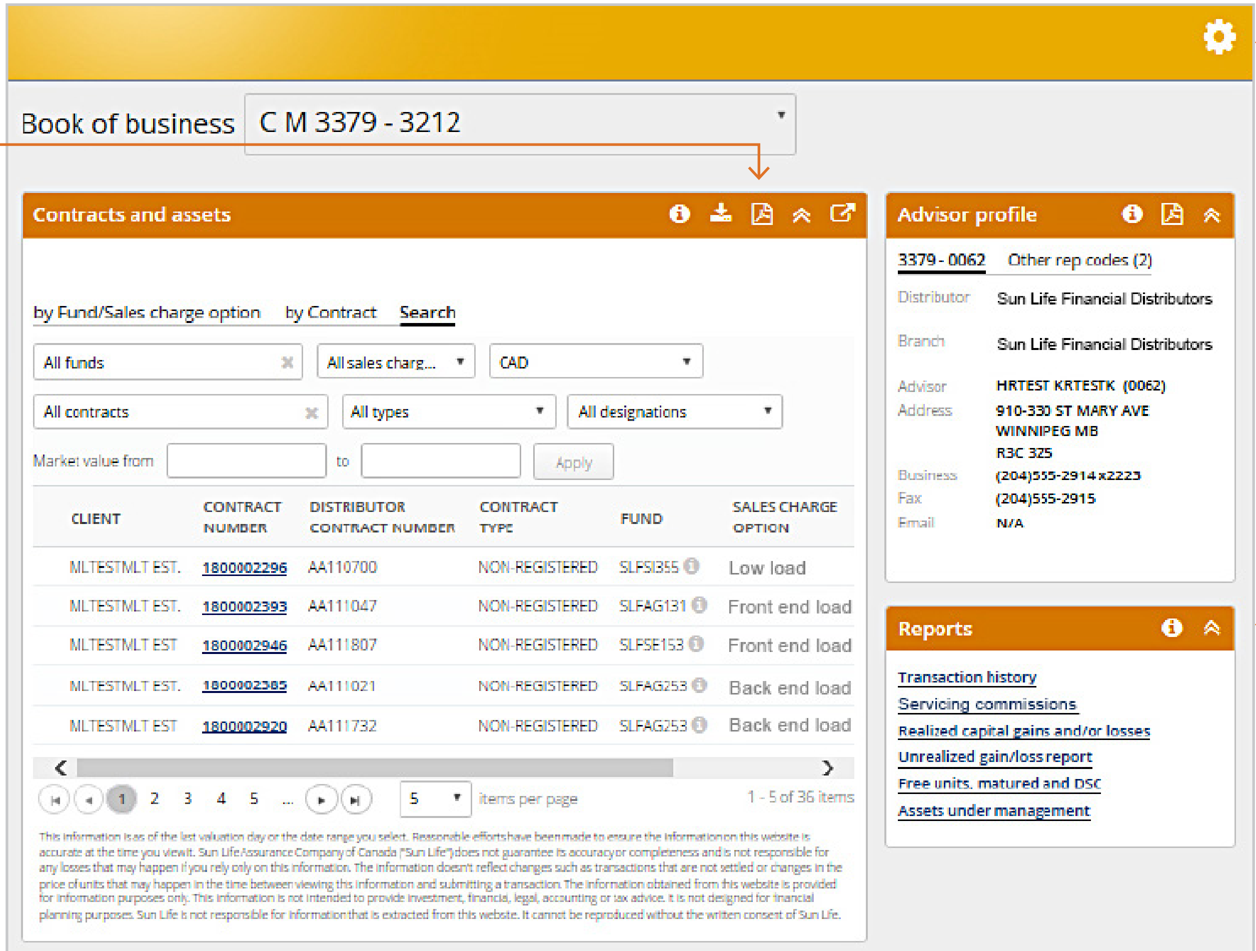
For future convenience, your most recently searched contract numbers appear here.

In this field, you can easily search for a Client's contract by their name or contract number.

Client assets can be displayed by fund or contract. You can also search across all contracts. Under "by Contract," you can see the market value and adjusted cost base for each contract.

If you have more than one rep code, you can select the one you want to view details under. The page refreshes with your selected rep code information.

Advisor view



- View module-specific details
- Download to a CSV file
- Download to a PDF file
- Collapse the module
- Expand the module

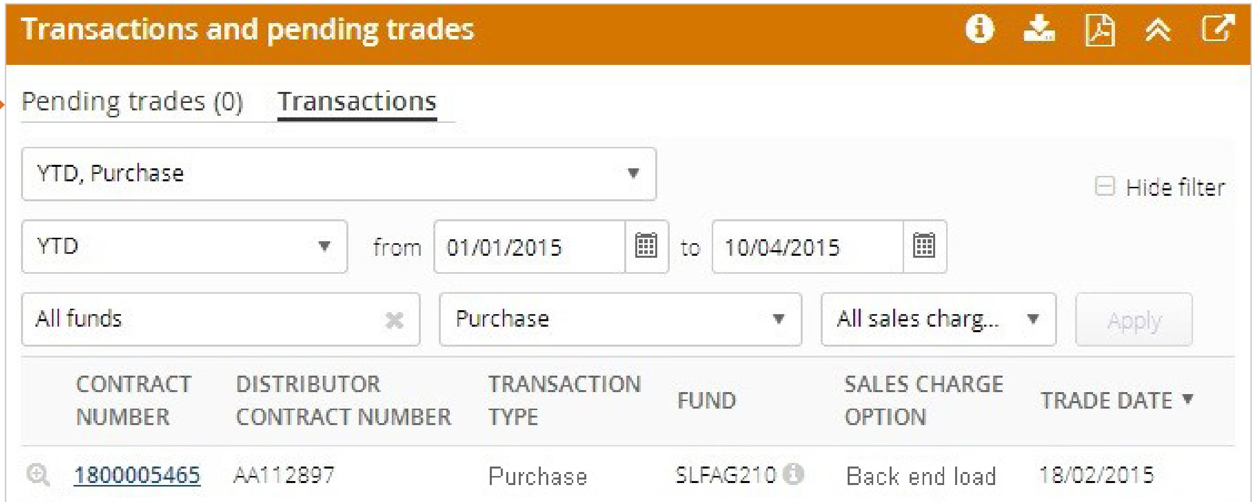
Generate these reports for all your Clients at once, including DSC, free and matured units, and gains and losses.

You can sign off here.

Advisor view

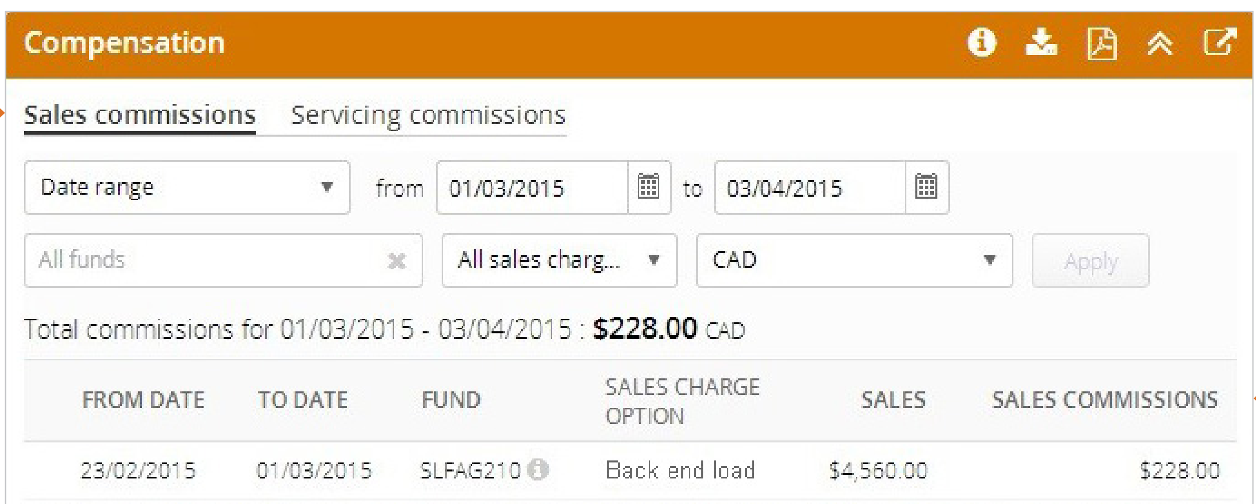
Transactions

You're able to search for settled or unsettled transactions across all contracts.



You can search for transactions by fund code or date range. Once we receive your trade, it will appear as pending.

Compensation



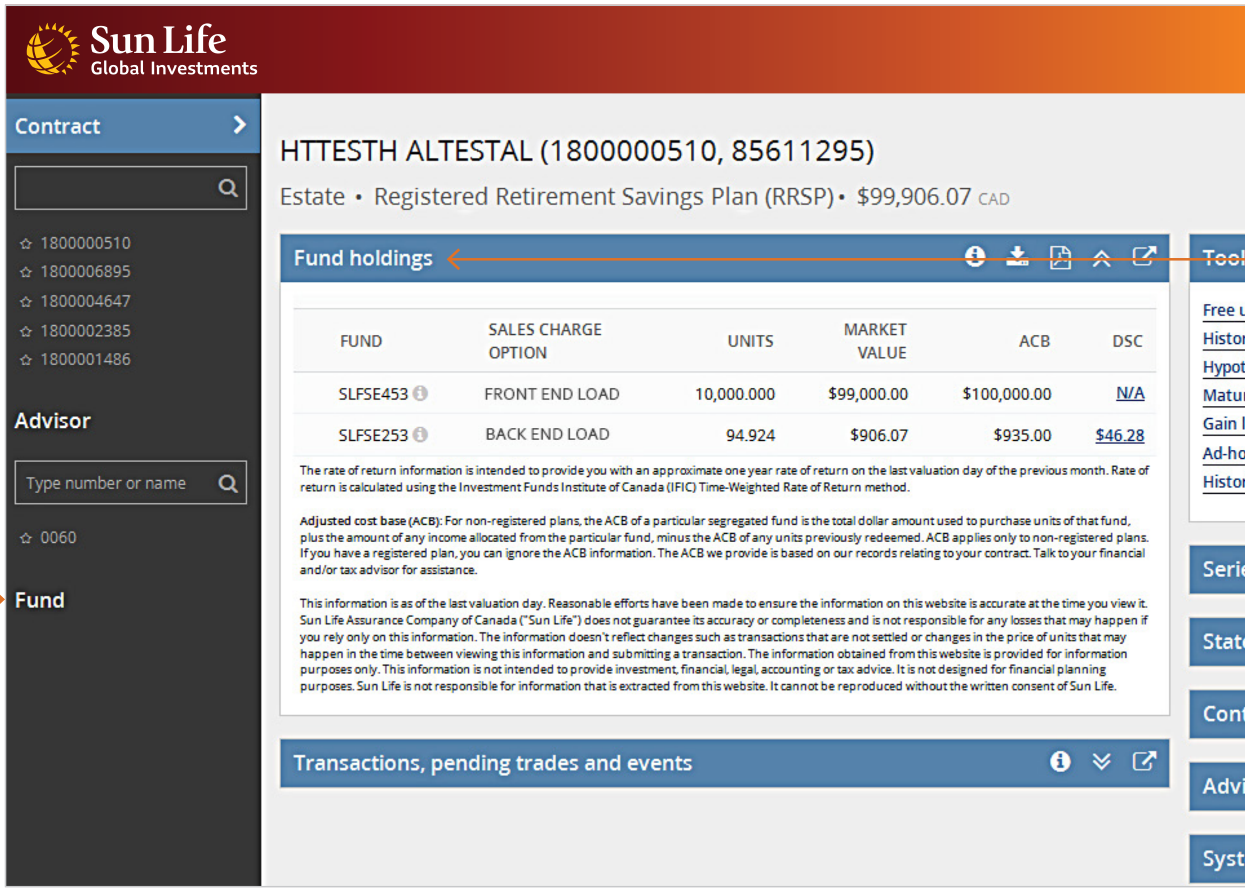
In this section, you can see the sales and servicing commissions (trailers) that are paid. You can search for them by date range, fund, or sales charge option.

Column data can be arranged in ascending or descending order according to your preference.

Client/Contract view

Holdings, tools and reports

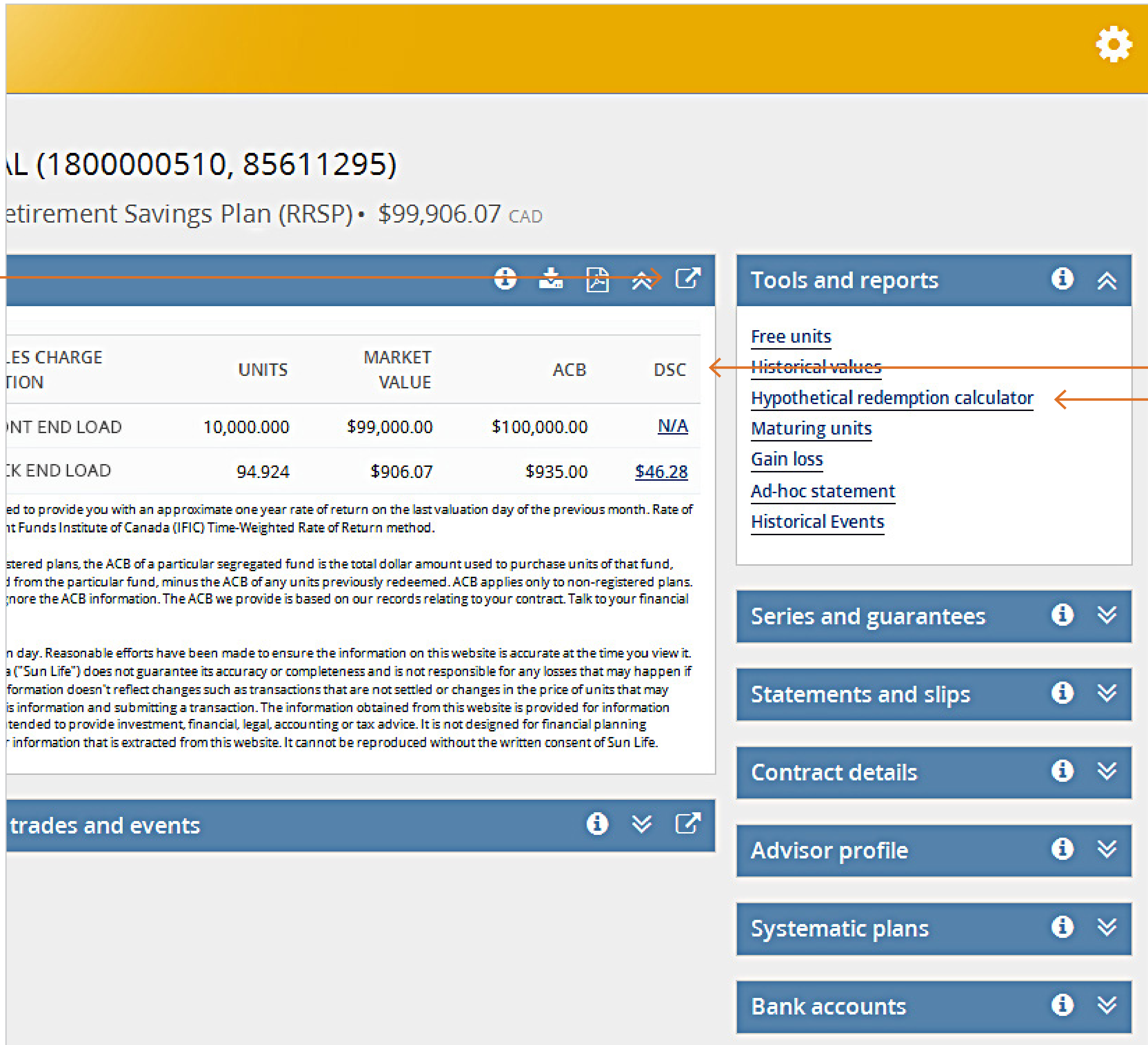
When viewing information at a Client or contract level, headings on screen will appear in light blue.



Fund information can be found here, including current and historic unit values.

Easily view fund holdings at a contract level.

Client/Contract view



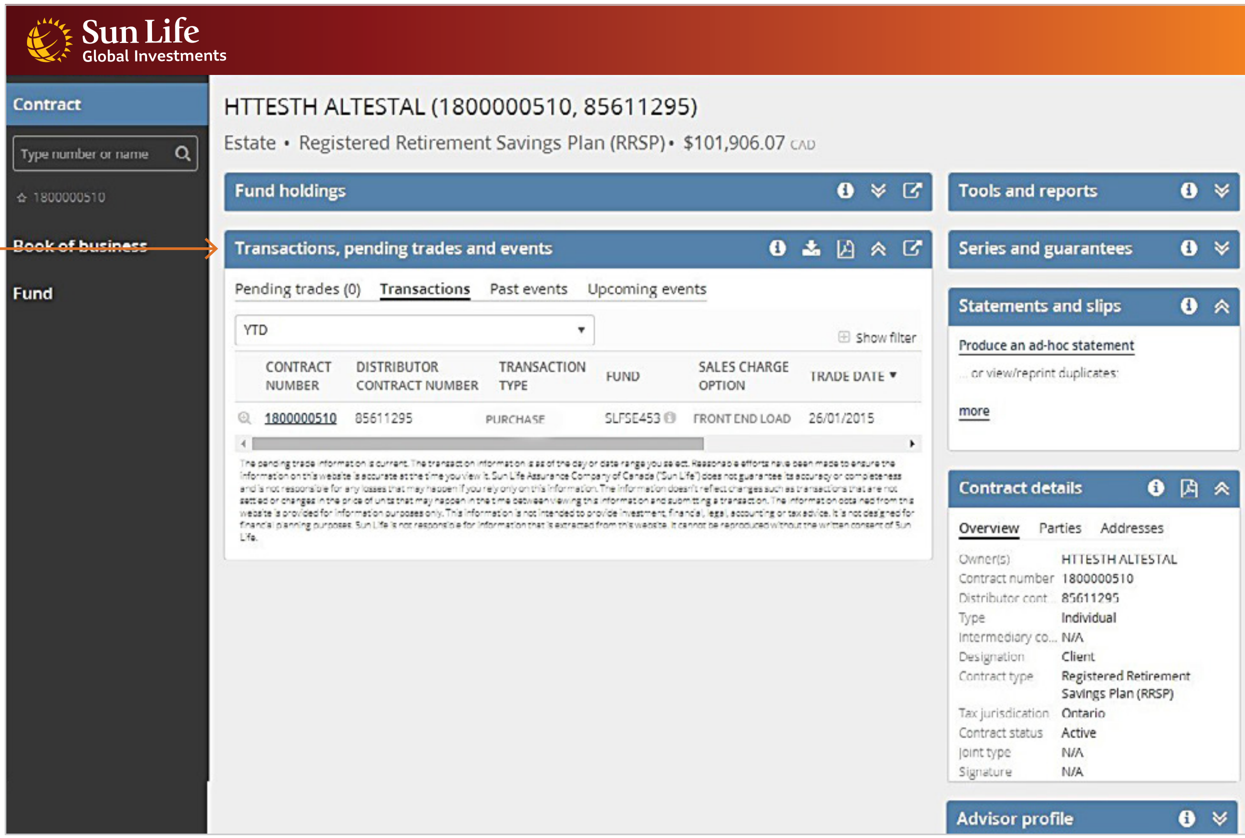
By expanding this section, at a contract level, you can view a one-year personal rate of return as of the previous month-end. You can also view unrealized gains and/or losses.

Contract level tools and reports are available to you here.

You're able to view the approximate DSC for a fund if it's redeemed.

Client/Contract view

Statements, slips and details



Just as you can view transactions and pending trades for all your Clients at once, you can also view them at a contract level.

View important contract information, including the owner, annuitant, and beneficiary details, as well as the tax type.

Conveniently generate ad hoc reports and view and print duplicate statements, confirmations and tax slips.

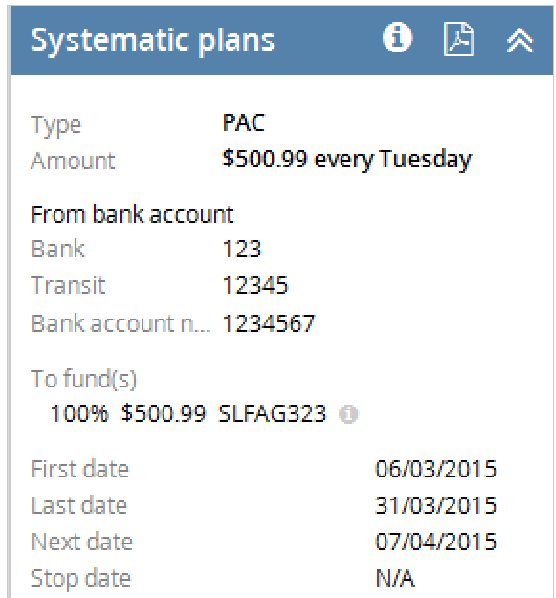
Client/Contract view

Series and guarantees

In Series and guarantees, you can view contract details for each specific guarantee series within a contract.

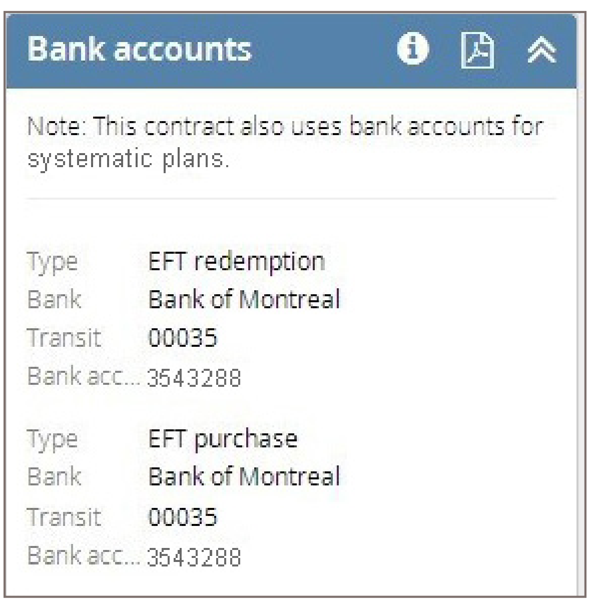
Systematic plans

You can view all systematic plans applicable to a contract, including pre-authorized chequing (PAC) plans and systematic withdrawal plans (SWPs).



Banking information

Here, you can see a list of all bank accounts associated with a given contract. For example BMO 0035 3543288 is set up to be used for electronic fund transfers (EFTs) to the bank account.



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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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.

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).

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