

Group Retirement Services

INVESTMENT SOLUTIONS TEAM

Sun Life Group Retirement Services offers innovative investment solutions – it's what we do best – and it all begins with our Investment Solutions team.

Our Investment Solutions professionals provide our clients with perspective on investment selections, monitoring and analysis. They can work in partnership with our clients and their consultants or plan advisors to develop an effective investment program that not only meets the purpose of their plan, but recognizes the diversity of their plan members. Each member of our Investment Solutions team is well equipped to help clients better understand their investments within the capital accumulation plan industry and the broader Canadian marketplace.

The Investment Solutions team is supported by the International Investment Centre, which provides manager research and due diligence support to various business units within Sun Life globally.

Investment Solutions Executives adhere to a supplemental code of conduct to ensure that clients receive guidance that is not unduly influenced by real or apparent conflicts of interest. They provide strategic direction to a number of high-level committees who develop, implement and support our investment programs, governance structure, information and tools.

ALEXANDRA BARBU, *Assistant Vice President, Investment Solutions*

Alexandra leads the team of investment professionals who oversee governance, reporting and research activities in support of Sun Life's Group Retirement Services. Alexandra has over 15 years of pension and investment consulting experience, having provided investment manager research, performance monitoring and consulting services to various defined contribution, defined benefit, endowment and foundation clients.

She is responsible for overseeing relationships with investment managers, bringing investment products to the market, and representing Investment Solutions on various committees. Overseeing the execution of pension committee investment and education, investment fund selection and on-going monitoring of investment managers and funds are also central to her role.

Alexandra joined Sun Life in March 2009 from the investment consulting practice of a large consulting firm and holds an Honours Bachelor of Business Administration degree from Wilfrid Laurier University with a minor in French.



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MALEK BEY, *Investment Solutions Executive, Quebec and Eastern Canada*

Malek supports plan sponsors and their advisors with governance and monitoring activities for the investment options available in their plan and on our core investment platform.

Malek joined Sun Life in July 2019, as an Investment Solutions Executive, based in Montreal. Malek has over 10 years of pension and investment consulting experience. Most recently, he was a senior investment consultant at Desjardins. Malek provided investment advice and support to group retirement services plan sponsors, advisors and consultants in Quebec, Ontario and Eastern Canada. Malek's prior roles included consulting firms and providing pension and investment consulting services to various defined contribution, defined benefit, endowment and foundation clients.

Malek holds a Bachelor of Actuarial Sciences from the University of Quebec and has completed his Fellowship of the Society of Actuaries (FSA) and his Fellowship of the Canadian Institute of Actuaries (FCIA).

JEFFREY CORBETT, *Investment Solutions Executive, Ontario*

Jeff focuses on providing plan advisors and their clients with information and assistance when they select investments offered through Sun Life. In addition, he assists clients with their fund selection, investment reviews and governance, to help them meet their obligations as plan sponsors.

Jeff has spent over 18 years with Sun Life. Prior to joining the Investment Solutions team, he held a variety of roles within Individual Wealth Management, most recently as product manager, mutual funds, for Sun Life's mutual fund dealer.

Jeff has an Honours Bachelor of Arts degree (Economics and Financial Management) from Wilfrid Laurier University and has the Chartered Investment Manager (CIM®) designation.

ANTHONY CORONA, *Investment Solutions Executive, Ontario and Western Canada*

Tony helps clients meet their fiduciary duties by providing perspective on the investments offered through Sun Life. He assists clients with fund selection and ongoing reviews of the investment funds offered in their retirement plans. Tony also works closely with the International Investment Centre and contributes to investment manager research.

Tony has 18 years of investment industry experience. He joined Sun Life in April 2009 with prior experience at an investment consulting firm where his responsibilities included manager research, performance and compliance monitoring, investment policy statement reviews, manager searches and service provider searches.

Tony holds a Bachelor of Commerce, Honours Business Administration degree from the University of Windsor and is a CFA® charterholder.

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LINA IRAWATI, *Investment Solutions Executive, Ontario*

Lina provides investment advice and support to plan sponsors, advisors and consultants on fund selection, investment reviews and governance. Lina is also responsible for performing fund evaluations for Group Retirement Services.

Lina started her career in the investment industry in 2004 at a family office in Singapore where she was responsible for investment manager selection and monitoring. She subsequently joined a global custody bank where she provided institutional investors with performance analysis and risk management solutions. In 2011, Lina joined Sun Life's internal investment consulting team, the International Investment Centre, which provides manager due diligence and oversight support to various business units globally within Sun Life. She moved to the Investment Solutions team in March 2016.

Lina holds a Master's degree in Economics from National University of Singapore, the Certificate in Investment Performance Measurement (CIPM®) and Financial Risk Manager (FRM) designation. Additionally, Lina is both a CFA® and a CAIA charterholder.

ANGELA MAITLAND, *Investment Solutions Executive, Western Canada*

Angela provides investment advice and support to plan sponsors, advisors and consultants in Western Canada on fund selection, investment reviews and governance. She joined Sun Life in January 2017, bringing over 25 years' experience in the financial services industry, spanning portfolio and relationship management for both institutional and private clients.

Most recently, Angela held the position of Vice President, Portfolio Manager and Relationship Manager at a major institutional investment firm in Calgary. Her responsibilities included client relationship management, creation and execution of the client service strategy and asset retention. Additionally, Angela oversaw the ongoing management of balanced investment portfolios for institutional investors on a discretionary basis. She has also held various roles as a Private Wealth Counsellor and Regional Manager, Retirement and Investment Services in Toronto and Calgary and is a CFA® charterholder.

ERIC MOONEY, *Investment Solutions Executive, Ontario*

Eric focuses on providing plan advisors and their clients with information and assistance when they select investments offered through Sun Life. In addition, he assists clients with investment reviews, fund selection and governance, to help them meet their duties as plan sponsors.

Eric has been with Sun Life for 5 years. He started at Sun Life within Individual Wealth Management in a Product Development/Management position before joining the Investment Solutions team in GRS. Prior to joining Sun Life, he spent 5 years at a Canadian fund company in a sales and marketing role and 1 year at a private equity manager as an Investment Analyst.

Eric has an Honours Bachelor of Commerce degree from the University of Ontario Institute of Technology and is a CFA® charterholder.

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MIKE ROBBIE, *Investment Solutions Executive, Ontario and Western Canada*

Mike supports plan sponsors and their advisors in monitoring and making investment decisions with respect to their investment funds and conducts governance activities on the investment options available on Sun Life's Group Retirement Services investment platforms.

Mike joined Sun Life in September 2014 and brings 20 years of related industry experience to his current role. He has worked in consulting, operations and business development roles at several leading financial services firms in North America.

Mike holds a Bachelor of Commerce degree from Queen's University. He is a CFA® and a CAIA charterholder.

CAMERON WILDE, *Senior Investment Solutions Analyst*

Cameron provides analytical support for the Investment Solutions team and is responsible for providing plan sponsors with high-quality, timely information on the funds offered in the core investment platform. In addition, Cameron conducts research and participates in product development.

Cameron joined Sun Life from a prominent investment firm where he worked as a product analyst with the Institutional Sales team, and gained valuable experience in its Marketing and Corporate Accounting departments.

Cameron holds a Bachelor of Commerce specializing in Management Economics from the University of Guelph, Certificate of Investment Performance Measurement (CIPM®) and has completed the Canadian Securities and IFIC Operations courses.

AISHWARYA VINE, *Investment Solutions Analyst*

Aishwarya provides analytical support for the Investment Solutions team and is responsible for providing plan sponsors with high-quality, timely information on the funds offered in the core investment platform. In addition, Aishwarya conducts research and participates in product development.

Prior to joining Sun Life in January of 2017, Aishwarya spent three years at an investment consulting firm where she worked as an investment analyst. Her main responsibilities included quarterly reporting, annual plan operations reporting, investment manager research, responsible investing research and conducting investment manager searches/reviews.

Aishwarya holds an Honours Bachelor of Business Administration degree with a concentration in Finance from Wilfrid Laurier University and is a CFA® charterholder.

Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies.

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