

# Need help picking your funds?

## We have a tool to help!



Feeling overwhelmed by having to choose which funds to invest your money in? A second opinion can help you be comfortable that you're picking the right funds for you and your goals.

We can all use a helping hand, especially when it comes to investing. Our online Asset allocation tool is here to help. It makes picking and reviewing your funds easy.

Best of all, the tool is customized to your workplace plan and your products and funds. The best part is it only takes a few minutes to complete!

Life's brighter under the sun



# Get started now

1

Sign in to [mysunlife.ca](https://mysunlife.ca).

2

Select **Manage plan**, then **Tools**.

3

Choose which product you want the tool to check.

4

Tell us how you want to invest: based on your comfort with risk, when you need your money, or both.

5

Answer our short risk-profile questionnaire or pick when you need your money.

6

Review your investment mix. Want to make changes to your funds? The tool helps you.

Your risk profile helps you understand how much risk you're comfortable with.

The screenshot shows a web interface for reviewing an investment mix. At the top, it says 'Choose your funds' and 'Step 2'. A 'Chat live now' button is in the top right. The main content area is titled 'Your risk profile' and shows 'Growth'. Below this, it says 'Your investment choices' and 'Review the funds below that may help you reach your goal investment mix'. There are five categories of funds listed with descriptions: Cash & equivalents, Fixed income, Canadian Equity, U.S. Equity, International equity, and Foreign/global equity. On the right side, there is a 'Review investment mix' section with a bar chart comparing 'Your investment mix' (dark blue) and 'Goal investment mix' (yellow). The chart shows the following percentages: Cash & Equivalents (0%), Fixed Income (32%), Canadian Equity (22%), U.S. Equity (28%), International Equity (18%), and Other (0%).

Quickly compare your recommended investment mix with how you're investing today.

Learn more about the funds available in your plan.

Use the tool regularly and whenever you're considering a change to your investments.

## We're here to help



**Go mobile:** Check your balances and see how your funds are doing.

Download the **my Sun Life mobile app** on Google Play or the Apple App Store.



Head to [sunlife.ca/contact-us](https://sunlife.ca/contact-us).

And sign in to [mysunlife.ca](https://mysunlife.ca) for tools, articles and videos.

Chat with us online for additional support.