

# Group Retirement Services Investment Solutions Team



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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.

## Meet our team

### **Alexandra Barbu, Assistant Vice President, Investment Solutions, Calgary**

With over 20 years of pension and investment consulting experience, Alexandra leads the team of investment professionals who oversee Sun Life’s Group Retirement Services’ investment governance, manager research and sustainable investing strategy. She is responsible for relationships with investment managers and bringing investment products to the market. 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. She holds an Honours Bachelor of Business Administration degree from Wilfrid Laurier University with a minor in French. Alexandra has earned the CFA Institute’s Certificate in ESG Investing.

### **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, in order to help them meet their obligations as plan sponsors.

Jeff has spent over 23 years with Sun Life and 13 years with the Investment Solutions team.

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 monitoring and selection of investment funds offered in their retirement plans. Tony also works closely with the International Investment Centre and contributes to investment manager research.

Tony has more than 20 years of investment industry experience. He joined Sun Life in April 2009 with prior experience at an investment consulting firm where his work 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.





### **Tarik Fathallah, Investment Solutions Executive, Quebec and Eastern Canada**

Tarik 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.

Tarik rejoined Sun Life in 2022 as an Investment Solutions Executive based in Montreal. Tarik has over 15 years of investment industry experience. Before rejoining Sun Life, he was an Investment Consulting Associate at Mercer. Tarik provided investment advice and support to group retirement services plan sponsors, advisors and consultants in Quebec, Ontario and Eastern Canada. Prior to Mercer, Tarik worked at Sun Life, first as a Financial Services Consultant and then in the GRS Small Business Centre. Tarik started his career at Standard Life/Manulife in a member education role.

Tarik has a Bachelor's degree in finance from HEC Montreal and is a licensed group annuity plans advisor.

### **Lina Irawati, Investment Solutions Executive, Ontario**

Lina provides investment advice and help to plan sponsors, advisors and consultants on fund selection, investment reviews and governance.

Lina started her career in the investment industry in 2004 at a family office in Singapore. 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 (IIC). The IIC 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. She also holds the Certificate in Investment Performance Measurement (CIPM®) and Financial Risk Manager (FRM) designations. 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 help 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 11 years. He started at Sun Life within Individual Wealth Management in a Product Development/Management position before joining the Investment Solutions team in GRS. Before joining Sun Life, he spent five years at a Canadian fund company in a sales and marketing role. He also spent one 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. He is also a CFA® charterholder.

### **Mike Robbie, Investment Solutions Executive, Ontario and Western Canada**

Mike supports plan sponsors and their consultants in monitoring and making investment decisions with respect to their investment funds. He also conducts governance activities on the investment options available on Sun Life's Group Retirement Services investment platforms. Mike also has overall responsibility of the analysts on the Investment Solutions team.

Mike joined Sun Life in September 2014 and has 25 years of related industry experience. 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.

### **Aishwarya Vine, Senior 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 research.

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. She is also a CFA® charterholder and earned the CFA Institute's Certificate in ESG Investing.

### **Cameron Wilde, Manager, Investment Reporting and Analytics**

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 manager and product research, and manages the team of Investment Reporting Analysts.

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 and the Certificate of Investment Performance Measurement (CIPM®) designation.

### **Florence Gwarada, Investment Reporting Analyst**

Florence 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, Florence conducts manager research and works closely with our investment reporting provider.

Prior to joining Sun Life, she spent three years supporting Financial Advisors at Canadian fund companies and four years at a South African Wealth Management company. She started at Sun Life within Sun Life Global Investments as an Operational Support & Analytics Specialist before joining the Investment Solutions team.

Florence holds a Master of Business Administration from the University of New Brunswick and has completed the Canadian Securities course.

### **Petar Dragovic, Investment Solutions Analyst**

Petar 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, Petar conducts manager and product research.

Prior to joining Sun Life in April 2025, he was part of a team that managed a large investment platform as an analyst at another prominent investment firm. He has over 7 years of experience working in various financial service industry roles including banking, insurance and retirement.

Petar holds an Honours Bachelor of Business Administration degree with a concentration in Finance from Wilfrid Laurier University. He is currently pursuing the CFA® designation.

### **Dilan Pathiramage, Senior Investment Solutions Analyst - Acting**

Dilan 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, Dilan conducts manager and product research.

Dilan started his career in the investment industry in 2013 working in the financial planning and investment advisor channels with some of the largest Canadian banks. He has over 10 years experience working in business development, consulting and relationship management. Prior to joining Sun Life, he was a consultant for a well-known investment research company working with institutional clients.

Dilan holds a Master of Business Administration from Wilfrid Laurier University and the Certified Financial Planner (CFP®) designation.

