

The Sustainability webpages (the “webpages”) are for Sun Life Financial Inc., and where applicable, its subsidiaries, joint ventures and associates. Where the webpages refer to annual information, our fiscal year runs from January 1 to December 31. Where the webpages refer to quarterly information, our quarters are:

- Q1** – January 1 to March 31
- Q2** – April 1 to June 30
- Q3** – July 1 to September 30
- Q4** – October 1 to December 31

These webpages reflect the data that is available to Sun Life for each of the disclosed metrics. The default scope for disclosures on these webpages reflects the following Sun Life business groups (collectively, the “Core Data Group”):

- Canada
- U.S.
- Asia (includes Hong Kong, Indonesia, Philippines, International)
- SLC Management

**For clarity**, sustainable investing content generally also includes MFS and SLC Management affiliates (BGO, InfraRed and Crescent).

Exceptions based on data availability are reflected in footnotes throughout the webpages and, where indicated, vary from the Core Data Group as follows:

- NOTE 1: Includes Vietnam

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- NOTE 2: Excludes SLC Management; includes UK and Vietnam

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- NOTE 3: Includes Vietnam, MFS, UK, SLC Management affiliates (BGO, InfraRed, Crescent and Advisors Asset Management) and Asia joint ventures

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- NOTE 4: Includes Vietnam and Asia joint ventures (Malaysia and Philippines)

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- NOTE 5: Includes UK and Vietnam

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- NOTE 6: Excludes Asia (International) and SLC Management; includes Vietnam and Asia joint venture (Malaysia)

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- NOTE 7: Includes MFS

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- NOTE 8: Includes MFS, UK and Vietnam

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**All dollar amounts are in Canadian currency**, unless otherwise stated. References to “we,” “our,” “us,” “the Company,” and “Sun Life” mean Sun Life Financial Inc. and, where applicable, its subsidiaries, joint ventures and associates.