



Assumption Life's Pre-Packaged Investment Solutions

# Investing made as easy as forgetting to water your houseplant.

Need one less thing to think about? Our pre-packaged investment options offer a low-maintenance approach to investing. Unlike your houseplant, your investments will keep growing even if left unattended.

## THE ASSUMPTION LIFE DIFFERENCE

**Accessibility:** The initial investment begins at only \$500 or a pre-authorized contribution of \$25.

**Peace of mind with guarantees:** With maturity and death benefit guarantees, you can rest assured your assets will have a degree of protection.

**The potential for fee reductions:** Individuals who have \$50,000 or more in assets in an account will automatically benefit from fee reductions up to 0.10%!

High-quality fund managers



**Using any pre-packaged solution is easy!**  
Simply choose the option that best suits your risk tolerance and your saving goals

## Target Date vs. Target Risk

Professionally managed, automatically rebalanced

### SMARTSERIES

- Manages investments automatically based on a **target date**.
- Optimizes risk-reward profile over time.

SmartSeries offers the simplicity of a **complete portfolio in a single fund**. Set your retirement savings goal (no dream is too big!) and let Assumption Life's target date funds get you there.

- Based on your savings goal, the fund allocation adjusts to minimize risk as your target date approaches.
- Flexibility to adjust target date if the goal changes over time.

$$\text{Current year} + \text{Client target age} - \text{Current age} = \text{SmartSeries Fund}$$

### ASSUMPTION LIFE PORTFOLIOS

- Manages investments automatically based on risk profile.
- Broad diversification and asset allocation.

Assumption Life portfolios are designed to make investing simple and accommodate most individuals' needs and lifestyles.

#### TRADITIONAL PORTFOLIOS

- Focused on Canadian markets and active management.

#### SELECT PORTFOLIOS

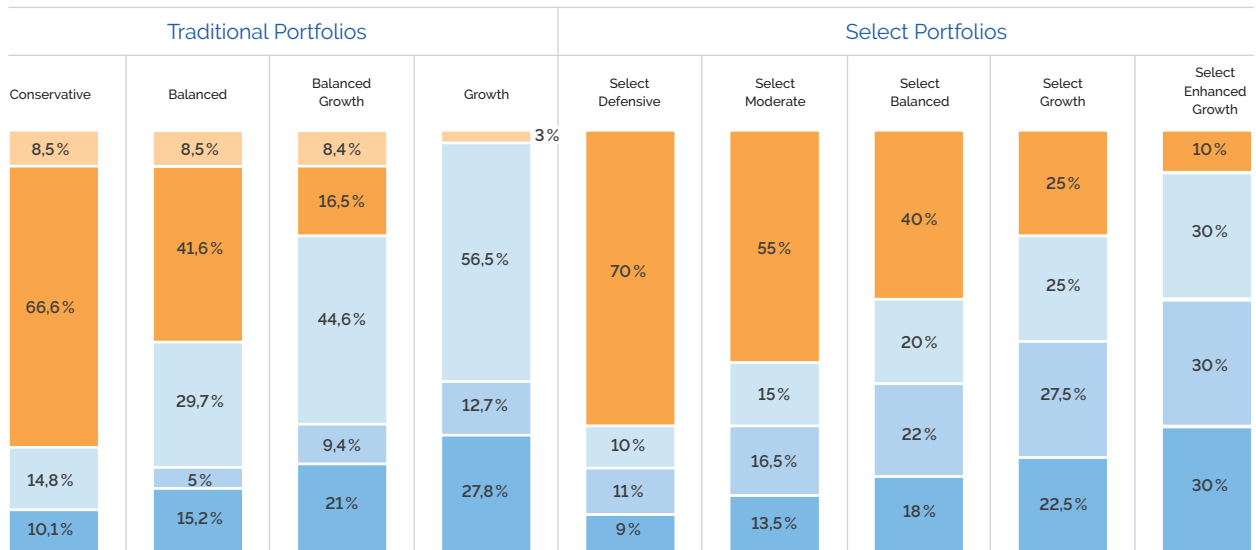
- Have a more global approach and include more passive investments through the use of exchange traded funds.

**1 Question = 1 Fund**

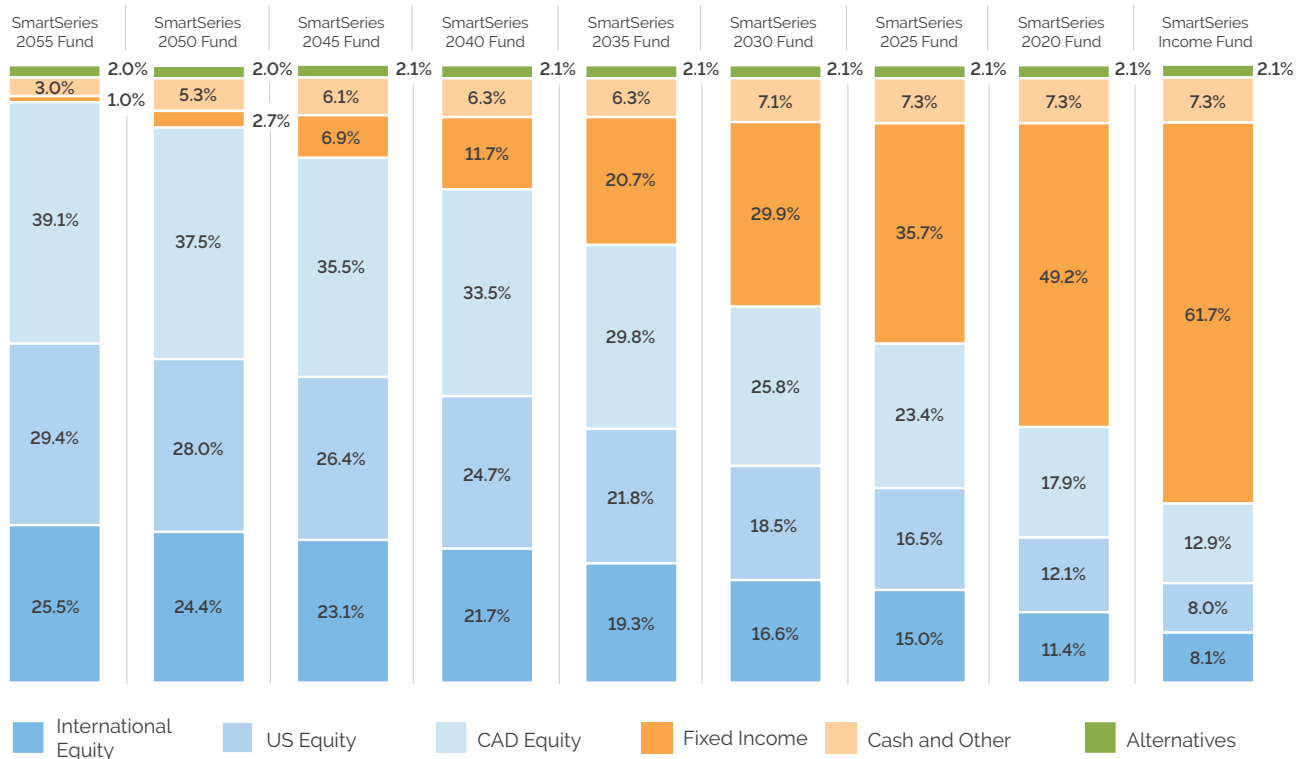
When do you need the money?

*With twice as much International equities as Canadian Equities, our **select portfolio** give investors more global investment options.*

# Assumption Life Portfolios



## SmartSeries Target Date Funds



It is strongly recommended that the client's various investments both with Assumption Life and elsewhere be taken into consideration when analyzing his/her asset allocation. This will ensure that the client's total asset allocation is properly aligned with the recommended asset allocation for his/her life cycle and risk tolerance.

SmartSeries funds are as of December 31, 2021. Traditional portfolios are as of December 31, 2020 and Select portfolios are as of March 29, 2021.



**Need some guidance to help you pick?**  
Scan to complete our Investment Strategy Guide.