

WOMEN IN LEADERSHIP

What do you love most about your leadership role?

I have the privilege of leading an experienced, high-performing team of diverse investment professionals. Together, we make a difference working closely with employers who sponsor capital accumulation plans (CAPs). This is strongly tied to Sun Life's purpose of helping Canadians achieve lifetime financial security. It's meaningful work.

My role has so much variety that keeps me busy and growing as a professional. I love that there is an art and science to it. Investments can be very technical—that's the science. The art is listening to evolving client needs and simplifying complex information. This helps people make informed decisions. Every day is different. Most days include a mix of pension committee meetings, researching investment managers and inspiring the team to think of innovative or creative solutions. All of this is underpinned by Sun Life's goal of helping plan members achieve better outcomes.

Why are you passionate about sustainability initiatives?

ESG considerations have become a basic requirement in investing. This is primarily part of risk management, but also helps to identify new investment opportunities.

Three years ago, we modernized our investment governance to include ESG. We created a proprietary evaluation framework covering our entire platform. The framework has also allowed us to observe best practices in ESG integration. We can engage more meaningfully with managers, recognize their progress and provide them with feedback to improve their ESG practices.

With a solid sustainable investing strategy, CAPs can achieve their key



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Alexandra Barbu

*Assistant Vice-President, Investment Solutions, Group Retirement Services
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goals. These include aligning their corporate sustainability strategy, meeting new fiduciary guidelines, attracting and retaining talent and ensuring members are aware of how their investment options consider ESG factors.

We have more to do and are in a great position to help shape the market and educate plan members on how ESG issues are addressed in their group retirement plans.

How has your perspective on work and life changed over the years?

I've been on this team for nearly 15 years, and about halfway through was promoted to lead the team.

One thing I've learned over the years is that I can't do everything. Instead of spreading myself thin, I pick the top two or three key initiatives and try to do a really good job with them. Setting priorities and boundaries (and honouring them) is very important to me.

My goal is to lead with compassion and lightheartedness. I believe this motivates team members to be at their best. I'm proud our team has some of the longest tenure within the company.

What's your advice to women starting careers in investments today?

Find a broad role with lots of variety. I started out in consulting so I could get to know the industry and the players. Make a "yes" list and, more importantly, a "no" list of roles or responsibilities you would and wouldn't like. Discover what you're passionate about and keen to wake up and do every day.

It's also important to find your network, nurture those connections and stay curious. One of my mentors had a great recommendation on how to do this: treat every interaction as an opportunity to meet a new client, prospect, employer, mentor or friend.

With respect to the investment management industry, it's no secret that women are underrepresented. This is especially true in leadership roles. Pursue relevant education opportunities that can add credibility early on. Then connect with mentors and leaders who make you feel supported. This will help you develop in the areas of the industry you're most curious about.