

WOMEN IN LEADERSHIP

What do you love most about your leadership role?

I truly love leading a hard-working and committed team as we collaboratively deliver on our mission of helping Canadians achieve financial security. I have the sincere pleasure of heading up an amazing team that inspires and energizes me every day. And although leadership is very demanding, especially in 2023 with the war for talent, I relish the challenge and find my work very rewarding. I see it as my responsibility to facilitate alignment and engagement, mobilize all team members in the same direction, remove barriers, instil trust and earn credibility.

What were some career highlights along your path towards this role?

I trained as an actuary, but I'm far from that today. My career started in pension consulting and I soon became a subject matter expert in my domain, as well as a trusted advisor to many large Canadian plan sponsors. In my mid-30s, still in the consulting field, I was offered the opportunity to start a line of business for Eastern Canada, focused on investment consulting for defined contribution (DC) plan sponsors. This meant I needed to create and lead a team. I also knew I was joining the male-dominated world of investments. That was a turning point in my career because it moved me out of pure actuarial evaluation and into the captivating world of investments, where I learned to lead a team and refine my strategic and political skills. I also expanded my network. Then, equipped with 25 years of consulting experience, I moved from making recommendations to making decisions by joining a money manager: Sun Life Global Investments. I've held three roles here since 2012, progressing from making individual contributions and back to leading a team, which is where I'm happiest and feel most fulfilled.

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Anne Meloche

*Head of Institutional Business
Sun Life Global Investments*

How important has it been for you to participate in leadership teams and committees?

Sitting at the leadership table is very important to me. I want to be "in the strategic know." I want to have a voice, share my opinion and have the chance to ask questions. I want to understand business opportunities and challenges. Also, I want to be empowered to influence the strategic direction of the firm I work with and any decisions that may impact my own business line and our clients.

Sitting on committees is also beneficial. At Sun Life Global Investments, I'm on the Sustainability Committee and the Net Zero Steering Committee—both allow me to share my expertise and be the voice of the institutional client. I also get to meet new people and learn from all the other subject matter experts.

What's your advice to women who are starting their careers in wealth today?

The wealth business continues to be male dominated—on the retail side, for example, just 15 per cent to 20 per cent of financial advisors in Canada are women. Yet in 2028, just five years from now, Canadian women will own



and control \$4 trillion in assets, almost double the \$2.2 trillion they control today. Studies also say that women are more comfortable taking investment risks with women advisors, so there's a big opportunity to serve women's financial needs. Meanwhile, firms like ours are at the forefront of efforts to promote gender equity in the workplace.

Women in wealth should not be afraid to explore opportunities across the industry. There are so many interesting channels within institutional and retail investments, as well as different areas like portfolio management, operations and product development. By exploring, women will discover new skills and interests. With well-rounded experience, career progression opportunities will be at their fingertips—and the entire industry will benefit from broader and more diverse contributions.