

Defined Contribution Investments

Leadership. Choice. Analytics.

Experience, strategies, and resources to support your retirement plan clients



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Why MFS® may be the right choice for your retirement plan clients

Attributes of top investment managers and DCI specialists	MFS delivers
Consistent historical performance records	✓
Rigorous, disciplined, time-tested investment approach	✓
Diversified investment choices to meet varying needs, investment styles, and risk comfort levels	✓
Fundamental and quantitative research	✓
Globally integrated analyst and portfolio manager teams	✓
Dedicated teams of investment and DCI experts	✓
Value-added programs to assist sales efforts and demonstrate investor commitment	✓
Management team with a long tenure and high retention rate	✓
Alignment of management interests with shareholders	✓

What makes a top investment manager

Two of the top three attributes of investment managers are “offering consistent performance over time” and “having an investment management process that’s easy to describe.”

Brightwork Partners LLC – Defined Contribution Consultants Survey, 4th quarter 2008

More than 55% of DC gatekeepers consider value-added programs as “important, very important or extremely important” tools to impact sales and demonstrate client commitment.

Sway Research – 2008 DC Gatekeeper Survey

Our Defined Contribution Investments team **UNDERSTANDS** the critical need to help your clients choose appropriate investments for their retirement plans.



MFS' DC Investments (DCI) team is fully committed to serving the unique needs of the defined contribution investments market. Our dedicated team consists of a national sales manager, national account managers, investment specialists, internal sales representatives, and an experienced home office management team.

Every member of our group is highly experienced in retirement plans. The average industry experience of the team exceeds 10 years. More than half our team holds a Certified Investment Management Analyst (CIMA) license, and more than three-fourths have the Accredited Retirement Plan Consultant (ARPC) designation.

We are here to support you and discuss a wide range of strategies and tools to help build your retirement plan practice. Our DCI specialists are available to meet with you in a variety of settings, including

- one-on-one or group meetings
- local office visits
- conferences
- seminars

MFS® has the **EXPERTISE**, the consistent investment **STRATEGIES**, and the comprehensive **RESOURCES** to support your retirement plan clients.



Decades of experience managing money and focusing on the retirement plan market

- **Inventor of the mutual fund** — Since establishing America's first mutual fund in 1924, MFS has managed money through a depression, 15 recessions, and 6 wars — a history no other mutual fund manager can match.
- **A combination of fundamental and quantitative research** that provides portfolio managers with in-depth information on individual securities and risk management.
- **A global asset manager with integrated research teams around the world**, including in Boston, London, Mexico City, Singapore, Sydney, and Tokyo.
- **A disciplined investment strategy** — Portfolios have remained “style pure.”
- **Defined contribution investments experience** — MFS has worked with retirement plans since 1970.

A wide array of investment strategies and funds across asset classes and global regions

- **A full suite of investment vehicles to meet different retirement plan needs, investment styles, and risk views**, including mutual funds, subadvised portfolios, and collective investment trusts.
- **Flexible pricing options** including a full suite of Class R shares. Availability on major platforms, including 14 of the top 20 defined contribution recordkeepers.
- **Long-term performance records** in all of the major asset classes.
- **A team-based investment approach** supported by experienced investment management professionals.

Resources and tools to support platforms, advisors, and participants

- **Access to the latest analytics and in-depth research**, including market overviews, competitive and style analyses, quarterly attribution analyses, plan menu, and fund-to-fund comparisons.
- **Value-added MFS programs**, including **Advanced (k)**, a new program to help you demonstrate your business model to plan sponsors, build relationships, and retain retirement plan clients. **Milestone MarketingSM** provides age-based and life-event opportunities to help you drive retirement income conversations with clients in their 50s, 60s, and 70s. **Heritage PlanningSM** addresses clients' life planning issues and helps you grow your business and strengthen client relationships.
- **Market and portfolio commentary** to help you stay current on MFS' view on market trends and MFS portfolio managers' strategies.

Partner with **EXPERIENCE** and a **TRUSTED** investment management leader.



Partnering with MFS and our DCI team gives you access to a full complement of investment vehicles and value-added services designed to provide your clients with thoughtful, tailored retirement plan options.

With 85 years of experience helping investors and institutions pursue their financial goals, MFS is an investment management pioneer. At the same time, we understand retirement markets from top to bottom and realize that our success is largely because of advisors like you.

By combining our investment management expertise and a proven ability to support retirement plan platforms and advisors, we can help you meet your clients' retirement plan needs with confidence. While many investment managers claim to deliver the support advisors need, MFS knows exactly what it takes to support you and we are committed to providing the information, tools, and extensive resources you need.

Consider adding one or more MFS funds to your clients' retirement plan lineup today. Call our dedicated Sales Desk at **1-800-637-8730** for more information, or visit us online at **mfs.com**.



INVESTMENT MANAGEMENT

CHOOSE WHAT FITS.®

MFS Investment Management®

We invented the mutual fund®

In 1924, MFS® established America's first mutual fund — Massachusetts Investors Trust.

We employ a consistent approach

- *Research-driven process:* Our proprietary method of evaluating securities is continuous and looks to identify high-quality investment opportunities in every major asset class around the world.
- *Global vision:* We have global analysts in six worldwide offices, tracking securities in more than 80 countries.
- *Disciplined choices:* We offer investors a diverse range of funds that are style consistent and carefully overseen to manage risk at the security and portfolio levels.

We invite you to CHOOSE WHAT FITS®

MFS is committed to providing advisors and their clients with a broad range of retirement plan options so they can choose what fits individual long-term goals and needs.

Call an MFS DCI specialist today at 1-800-637-8730 or visit mfs.com.

Before investing, consider the fund's investment objectives, risks, charges, and expenses. For a prospectus containing this and other information, contact MFS or view online at mfs.com. Read it carefully.

MFS FAMILY OF FUNDS®

STOCK FUNDS

	R1	R2	R3	R4
Massachusetts Investors Trust	MITGX	MIRTX	MITHX	MITDX
Massachusetts Investors Growth Stock Fund	MIGMX	MIRGX	MIGHX	MIGKX
MFS® Blended Research SM Core Equity Fund	MUERX	MUESX	MUETX	MUEUX
MFS® Core Equity Fund	MRGGX	MRERX	MRGHX	MRGJX
MFS® Core Growth Fund	MFCGX	MCRRX	MFCHX	MFCJX
MFS® Growth Fund	MFELX	MEGRX	MEFHX	MFEJX
MFS® Mid Cap Growth Fund	OTCGX	MCPRX	OTCHX	OTCJX
MFS® Mid Cap Value Fund	MVCGX	MCVRX	MVCHX	MVCJX
MFS® New Discovery Fund	MNDGX	MNDRX	MNDHX	MNDJX
MFS® Research Fund	MFRLX	MSRRX	MFRHX	MFRJX
MFS® Sector Rotational Fund	SRFDX	SRFEX	SRFFX	SRFGX
MFS® Technology Fund	MTCKX	MTERX	MTCHX	MTCJX
MFS® Total Return Fund	MSFFX	MTRRX	MSFHX	MSFJX
MFS® Utilities Fund	MMUGX	MURRX	MMUHX	MMUJX
MFS® Value Fund	MEIGX	MVRRX	MEIHX	MEIJX

ASSET ALLOCATION STRATEGIES

MFS® Asset Allocation Funds

• Conservative	MACKX	MCARX	MACNX	MACJX
• Moderate	MAMFX	MARRX	MAMHX	MAMJX
• Growth	MAGMX	MGALX	MAGEX	MAGJX
• Aggressive Growth	MAAFX	MAWAX	MAAHX	MAALX

MFS® Lifetime® Funds

• 2010	MFSEX	MFSNX	MFSOX	MFSPX
• 2020	MFLEX	MFLGX	MFLHX	MFLJX
• 2030	MLTEX	MLTGX	MLTHX	MLTJX
• 2040	MLFEX	MLFGX	MLFHX	MLFJX
• Retirement Income	MLLEX	MLLGX	MLLHX	MLLJX
MFS® Diversified Income Fund	DIFDX	DIFEX	DIFFX	DIFGX
MFS® Diversified Target Return Fund	DVRFX	DVRHX	DVRJX	DVRKX

GLOBAL/INTERNATIONAL FUNDS

MFS® Emerging Markets Equity Fund	MEMRX	MEMFX	MEMGX	MEMHX
MFS® Global Equity Fund	MWEGX	MEQRX	MWEHX	MWELX
MFS® Global Growth Fund	MWOGX	MGWRX	MWOHX	MWOJX
MFS® Global Total Return Fund	MFWGX	MGBRX	MFWHX	MFWJX
MFS® International Diversification SM Fund	MDIOX	MDIKX	MDIHX	MDITX
MFS® International Growth Fund	MGRRX	MGRQX	MGRTX	MGRVX
MFS® International New Discovery Fund	MIDGX	MIDRX	MIDHX	MIDJX
MFS® International Value Fund	MINRX	MINFX	MINGX	MINHX
MFS® Research International Fund	MRSGX	MRSRX	MRSHX	MRSJX

BOND FUNDS

MFS® Bond Fund	MFBGX	MBRRX	MBHGX	MBBJX
MFS® Emerging Markets Debt Fund	MEDDX	MEDEX	MEDFX	MEDGX
MFS® Government Securities Fund	MFGGX	MGVSX	MFGHX	MFGJX
MFS® High Income Fund	MHIGX	MIHRX	MHIHX	MHIJX
MFS® High Yield Opportunities Fund	MHORX	MHOSX	MHOTX	MHOJX
MFS® Inflation-Adjusted Bond Fund	MIALX	MIATX	MIAHX	MIAJX
MFS® Limited Maturity Fund	MQLGX	MLMRX	MQLHX	MQLJX
MFS® Research Bond Fund	MRBGX	MRRRX	MRBHX	MRBJX

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