

Portfolio Manager Update at MFS

Effective June 1, 2025, Joe Flaherty will retire as a portfolio manager and Chief Investment Risk Officer (CIRO) and will relinquish his portfolio management responsibilities on the MFS® LifePlan Funds. Natalie Shapiro, Ben Nastou and Erich Shingley will continue to serve as the portfolio management team. Natalie joined the team in 2018; Ben and Erich joined in 2023.

The funds' benchmark, fee, investment objective and style remain unchanged and no action is required.

Fund code	Fund name	Portfolio managers before the announcement	Portfolio managers after the announcement
MFSRT	Lifepan Retirement (MFS)	Joe Flaherty, Natalie Shapiro, Ben Nastou, Erich Shingley	Natalie Shapiro, Ben Nastou, Erich Shingley
MFS25	Lifepan 2025 (MFS)		
MFS30	Lifepan 2030 (MFS)		
MFS35	Lifepan 2035 (MFS)		
MFS40	Lifepan 2040 (MFS)		
MFS45	Lifepan 2045 (MFS)		
MFS50	Lifepan 2050 (MFS)		
MFS55	Lifepan 2055 (MFS)		
MFS60	Lifepan 2060 (MFS)		
MFS65	Lifepan 2065 (MFS)		

May 10, 2024