

DATE: June 30, 2022
CATEGORY: INVESTMENTS
TO: Managing General Agents, Associate General Agents, Advisors,
General Agents, Independent Financial Advisors and National Accounts
SUBJECT: Empire Life Segregated Funds June 30, 2022 Investment Statements

N° 2022-11

Mailing dates The Empire Life June 30, 2022 Investment Statements will be mailed to customers beginning July 20, 2022. Customers who have registered for MyEmpire - Insurance and Investments will be able to login to their online account and view their statement as of July 18, 2022. They will receive an email notification when their statement is available. Advisor copies of customer Investment Statements (eStatements) will be available online on the Business Centre beginning July 18, 2022.

Things you should know about the statements

- The statement period being reported for contracts is January 1, 2022 to June 30, 2022.
- The 2021 Investment Funds Annual Report is now available. To obtain a copy, we are advising customers to visit our website, e-mail us, or reach us by phone at 1 800 561-1268.
- Statements will contain a message to customers informing them that the new Segregated Funds Ongoing Disclosure Document (INV-2778) can be accessed on the Empire Life website.
- Empire Life will include an insert for customers who have qualified or will be qualified for the Empire for Life Loyalty Program as of December 31, 2022. Advisors with customers who have qualified will receive information about the Empire for Life Loyalty Program in early July, in advance of the customers receiving their notification.
- The advisor shown on the statements is the Servicing Advisor as of June 30, 2022.
- It is important that you review your customer's statements for accuracy. If you find a discrepancy, Empire Life needs to be informed no later than 30 days after receipt of the statement. Please keep in mind that we are unable to make corrections after the 30 day period following statement receipt, regardless of when the error occurred. Please contact the Advisor, MGA and National Accounts dedicated phone number at 1 800 536-7683 if you notice any discrepancies.
- Empire Life launched electronic customer statements beginning December 31, 2018. * Please encourage your customers to register for MyEmpire online at empire.ca/register.

* If customers do not sign up for eStatements, they will continue to receive paper statements.

If you have any questions regarding the Investment Statements, you may call our Customer Service team at 1 800 536-7683, Monday to Friday from 8:00 a.m. to 8:00 p.m. E.S.T.

Stephanie Wisniewski, Director, Retail Operations

Questions

Reference

