

**DATE:** January 5, 2023  
**CATEGORY:** INVESTMENTS  
**TO:** Managing General Agents, Associate General Agents, Advisors,  
General Agents, Independent Financial Advisors and National Accounts  
**SUBJECT:** Empire Life Segregated Funds December 31, 2022 Investment Statements

N° 2023-01

**Mailing dates** The Empire Life December 31, 2022 Investment Statements will be mailed to customers beginning January 24, 2023. Customers who have registered for MyEmpire - Insurance and Investments will be able to login to their online account and view their statement as of January 16, 2023. Advisor copies of customer Investment Statements (eStatements) will be available online on the Business Centre beginning January 16, 2023.

**Things you should know about the statements**

- The statement period being reported for ECF and CIE contracts is July 1, 2022 to December 31, 2022 and for EMP contracts is January 1, 2022 to December 31, 2022.
- The 2022 Investment Funds Annual Report will be available as of April 30, 2023. 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 for the Empire for Life Loyalty Program as of December 31, 2022. Advisors with customers who qualified would have received information about the Empire for Life Loyalty Program in early July 2022, in advance of the customers receiving their first notification in the June semi-annual statement.
- The advisor shown on the statements is the Servicing Advisor as of December 31, 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 at [empire.ca/register](http://empire.ca/register).
  - \* Customers who have opted in for electronic statements (eStatements) will not receive mailed copies and instead will receive an email notifying them to login to their account.
  - \* If customers do not sign up for eStatements, they will continue to receive paper statements.

**Questions** 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.

**Reference** Stephanie Wisniewski, Director, Retail Operations