INFORMATION CIRCULAR

DATE: January 21, 2020 **N° 2020-01**
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, 2019 Investment Statements**

Mailing dates

The Empire Life December 31, 2019 Investment Statements were mailed to customers beginning January 20, 2020. As a reminder, in an effort to go green, advisor copies of Investment Statements are now 100% paperless. PDF copies of the Investment Statements are now available on the Business Centre and you can chose individual or bulk statements as needed. We believe this offers you and your advisors more convenience and security.

Things you should know about the statements

- The statement period being reported for ECF contracts is July 1, 2019 to December 31, 2019 and for EMP contracts is January 1, 2019 to December 31, 2019.
- The 2019 Investment Funds Annual Report will be available as of April 30, 2020. 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.
- The advisor shown on the statements is the Servicing Advisor as of December 31, 2019.
- It is important that you review your client'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 is pleased to announce that we have launched electronic customer statements starting with December 31, 2018 statements. Customers will be notified with an insert in their December statements that encourages them to register and sign up for eStatements to access their statements safely and securely online.*

  * 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