

LIFE/UNIVERSAL LIFE INVESTMENT COMPONENT CHANGE FORM

Throughout this form, "Empire Life" means The Empire Life Insurance Company.

1.0 Owner first name	Middle initial	Last name	Policy number	
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Address (number, street name)		City	Province	Postal code

2.0 TRILOGY Universal Life

2.1 Change Multi-Life and Joint Last-to-Die Tax-Exempt Account Instructions

- Pay Tax-Exempt Account Value to the beneficiary(ies) on each death
- Pay Tax-Exempt Account Value to the beneficiary(ies) on last death

2.2 Change Planned Premium

- Change the Planned Premium Amount to \$ _____
 - Change the Planned Premium Frequency to: Monthly Pre-Authorized Debit (PAD)* Annual Billing
- *If changing to monthly PAD complete form C-0170 PAD Authorization.

2.3 Change Daily Interest Threshold

- Deposit my premiums to the Daily Interest Option. Amounts in excess of the Daily Interest Threshold equal to:
 - the minimum premium or \$ _____ are to be transferred to the Investment Options selected below.
- Deposit my premiums directly into the Investment Options selected below.
(not applicable if you are paying the minimum monthly premium)

2.4 Change Investment Instructions (Refer to page 5 for investment options)

Allocation of Planned Premiums		Deduct the Cost of Insurance from the following*	
Investment Options (e.g. Indexed Bond Investment Option, 1yr GIO, Daily Interest Option)	Allocation (%)	Investment Options (e.g. Indexed Bond Investment Option, 1yr GIO, Daily Interest Option)	Allocation (%)
Total for each allocation column must equal 100%			

*Only applicable if you are paying more than the minimum. If left blank, the Cost of Insurance charges will be deducted as per the Allocation of Planned Premiums.

2.5 Transfer Between Investment Options (Refer to page 5 for investment options)

TRANSFER FROM (e.g. Bond fund)	Allocation <input type="radio"/> % or <input type="radio"/> \$	TRANSFER TO (e.g. 10yr GIO)	Allocation <input type="radio"/> % or <input type="radio"/> \$

2.6 Additional Deposits Cheque attached (Refer to page 5 for investment options)

Investment Options (e.g. Indexed Bond Investment Option, 1yr GIO, Daily Interest Option)	Allocation <input type="radio"/> % or <input type="radio"/> \$



LIFE/UNIVERSAL LIFE INVESTMENT COMPONENT CHANGE FORM cont'd

3.0 OPTIMAX

To determine if your policy is an "OPTIMAX," "OPTIMAX II" or "OPTIMAX III" plan, please refer to the policy details page of your Policy Contract. Not all options are available on all plans.

Change Investment Options and/or Allocation of Additional Deposits for OPTIMAX plans issued after October 2005.

3.1 Additional Deposits Cheque attached (Refer to page 5 for investment options)

Tax-exempt Indexed Options	Amount <input type="radio"/> % or <input type="radio"/> \$

Guaranteed Interest Options (GIO)

_____ Year Guaranteed Interest Option	
_____ Year Guaranteed Interest Option	

Daily Interest Options

Daily Interest Account	
Paid-up Additions Rider Daily Interest Option (may be subject to medical evidence)	

3.2 Transfer Between Investment Options (Refer to page 5 for investment options)

TRANSFER FROM	Amount <input type="radio"/> % or <input type="radio"/> \$	TRANSFER TO	Amount <input type="radio"/> % or <input type="radio"/> \$

4.0 OPTIMAX II

4.1 Deposits <input type="radio"/> Cheque attached	EXEMPT INVESTMENT OPTIONS		INVESTMENT PLAN OPTIONS	
Indexed Options	Additional Deposit <input type="radio"/> % or <input type="radio"/> \$	Regular Premium <input type="radio"/> % or <input type="radio"/> \$	Additional Deposit <input type="radio"/> % or <input type="radio"/> \$	Regular Premium <input type="radio"/> % or <input type="radio"/> \$
Indexed Asset Allocation Investment Option			N/A	N/A
Indexed Bond Investment Option			N/A	N/A
Indexed Elite Equity Investment Option			N/A	N/A
Indexed Global Equity Investment Option			N/A	N/A
Elite Equity Fund	N/A	N/A		
Portfolio Investment Option				

4.2 Transfer Between Investment Options (Refer to page 5 for investment options)

Please indicate if Exempt (E), Non-registered (NR) or Registered (R) in the Account Type column below.

TRANSFER FROM (e.g. Indexed Bond)	Account Type	Amount <input type="radio"/> % or <input type="radio"/> \$	TRANSFER TO (e.g. Indexed Elite Equity)	Account Type	Amount <input type="radio"/> % or <input type="radio"/> \$

Note: Index Options are indexed to Class A of the Empire Life Segregated Fund.

LIFE/UNIVERSAL LIFE INVESTMENT COMPONENT CHANGE FORM cont'd

5.0 OPTIMAX III

5.1 Deposits Cheque attached (Refer to page 5 for investment options)

Guaranteed Interest Options (GIO)	Additional Deposit <input type="radio"/> % or <input type="radio"/> \$	Regular Premium <input type="radio"/> % or <input type="radio"/> \$
_____ Year Guaranteed Interest Option		
_____ Year Guaranteed Interest Option		
Daily Interest Option		

5.2 Transfer Between Investment Options (Refer to page 5 for investment options)

TRANSFER FROM (e.g. 1 Year GIO)	Amount <input type="radio"/> % or <input type="radio"/> \$	TRANSFER TO (e.g. 3 Year GIO)	Amount <input type="radio"/> % or <input type="radio"/> \$

6.0 CONCEPT 2000

6.1 Deposits Cheque attached (Refer to page 5 for investment options)

INVESTMENT OPTIONS	EXEMPT		NON-REGISTERED		REGISTERED	
	Additional Deposit <input type="radio"/> % or <input type="radio"/> \$	Regular Premium <input type="radio"/> % or <input type="radio"/> \$	Additional Deposit <input type="radio"/> % or <input type="radio"/> \$	Regular Premium <input type="radio"/> % or <input type="radio"/> \$	Additional Deposit <input type="radio"/> % or <input type="radio"/> \$	Regular Premium <input type="radio"/> % or <input type="radio"/> \$
Treasury Interest Option						
Guaranteed Interest Options (GIO)						
_____ Year Guaranteed Interest Option*						
_____ Year Guaranteed Interest Option*						
Index Options						
Indexed Asset Allocation Investment Option			N/A	N/A	N/A	N/A
Indexed Bond Investment Option			N/A	N/A	N/A	N/A
Indexed Elite Equity Investment Option			N/A	N/A	N/A	N/A
Indexed Global Equity Investment Option			N/A	N/A	N/A	N/A
Class A Segregated Fund Options						
	N/A	N/A				
	N/A	N/A				
	N/A	N/A				
	N/A	N/A				
	N/A	N/A				
	N/A	N/A				

*If GIO is selected a minimum deposit of \$500 is required.

6.2 Transfer Between Investment Options (Refer to page 5 for investment options)

Please indicate if Exempt (E), Non-registered (NR) or Registered (R) in the Account Type column below.

TRANSFER FROM (e.g. Bond Fund)	Account Type	Amount <input type="radio"/> % or <input type="radio"/> \$	TRANSFER TO (e.g. Income Fund)	Account Type	Amount <input type="radio"/> % or <input type="radio"/> \$

LIFE/UNIVERSAL LIFE INVESTMENT OPTIONS

Trilogy and Optimax Investment Options

Market Indexed Options

American Equity Index Option
 American Growth & Technology Index Option
 Canadian Bond Index Option
 Canadian Equity Index Option
 Eurasian Equity Index Option
 European Equity Index Option
 Japanese Equity Index Option

Indexed Options*

Indexed Elite Equity Investment Option
 Indexed Global Equity Investment Option
 Indexed Asset Allocation Investment Option
 Indexed Bond Investment Option
 Indexed Dividend Growth Investment Option
 Indexed Small Cap Equity Investment Option
 Indexed Income Investment Option
 Indexed American Value Investment Option
 Indexed Balanced Investment Option
 Indexed Global Smaller Companies Investment Option
 Indexed Canadian Equity Investment Option

Portfolio Indexed Options*

Indexed Conservative Portfolio Investment Option
 Indexed Balanced Portfolio Investment Option
 Indexed Moderate Growth Portfolio Investment Option
 Indexed Growth Portfolio Investment Option
 Indexed Aggressive Growth Portfolio Investment Option

Guaranteed Interest Options (GIO)

Trilogy/Trilogy Plus available terms: 1, 2, 3, 4, 5, 10 & 20 year terms

Optimax available terms: 1, 2, 3, 4, 5, 6 & 10 year terms

Daily Interest Option

Optimax II Investment Options

Indexed Options

Indexed Asset Allocation Investment Option
 Indexed Bond Investment Option
 Indexed Elite Equity Investment Option
 Indexed Global Equity Investment Option

Elite Equity Fund

Portfolio Investment Option

Concept 2000 Investment Options

Tax Exempt Index Options

Indexed Asset Allocation Investment Option
 Indexed Bond Investment Option
 Indexed Elite Equity Investment Option
 Indexed Global Equity Investment Option

Segregated Fund Investment Options

Money Market Fund – Class A
 Bond Fund – Class A
 Income Fund – Class A
 Global Balanced Fund – Class A
 Balanced Fund – Class A
 Asset Allocation Fund – Class A
 Global Dividend Growth Fund – Class A
 Dividend Growth Fund – Class A
 Canadian Equity Fund – Class A
 Elite Equity Fund – Class A
 Small Cap Equity Fund – Class A
 American Value Fund – Class A
 US Equity Index Fund – Class A
 Global Equity Fund – Class A
 Global Smaller Companies Fund – Class A
 International Equity Fund – Class A
 Conservative Portfolio Fund – Class A
 Balanced Portfolio Fund – Class A
 Moderate Growth Portfolio Fund – Class A
 Growth Portfolio Fund – Class A
 Aggressive Growth Portfolio Fund – Class A

Guaranteed Interest Options (GIO)

Available terms: 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5, 6 & 10 year terms

Treasury Interest Option

Optimax III Investment Options

Guaranteed Interest Options (GIO)

Available terms: 1, 2, 3, 4, 5, 6 & 10 year terms

Daily Interest Option

