

DATE: December 6, 2018 **N° 2018-25**
CATEGORY: **INSURANCE/INVESTMENTS**
TO: Managing General Agents, Associate General Agents, Advisors, General Agents, National Accounts
SUBJECT: **Introducing a new Advisor Portal experience**

Empire Life is proud to announce the launch of an enhanced advisor portal experience with features advisors have been asking for. Our new advisor portal offers real time status of insurance applications and new functionality to ensure that advisors can provide the highest level of customer service, simple, fast and easy.

NEW “My Advisor Dashboard” features:

- Real time status of Fast & Full insurance applications and real time New Business updates for paper and Fast & Full insurance apps (no need to visit the Business Centre to check status)
- Ability to make additional segregated fund deposits electronically to existing contracts (including TFSA and RRSP) anytime, day or night
- Quick access to the new Envision web illustrator so you know you are always using the most up to date version (no software to install)

Other portal enhancements:

The Advisor Portal features responsive design so it looks and works great no matter what device you’re using. The filter button on your dashboard lets you view applications by status so you see only the client info you need.

In addition, enhanced search means you can find forms fast and pin your favourites for easy reuse, and “Quick links” to frequently used Empire Life resources such as Fast & Full, the web illustrator and the current commission schedule.

Built with your feedback:

You’ve spoken and we’ve listened. This launch is the next step in the evolution of Empire Life digital platforms for customers and advisors, but we want to hear from you. Please share your experience with the new Advisor Portal via the “Give feedback” button.

Launch date: December 6, 2018

How to register for access:

If you already have an Empire Life login, you’re ready to go. If not, registration is easy. Just visit www.empire.ca select **Login > Retail Advisor Login > Register tab**

Reference:

Geoff Gibson
Director, Investment Marketing and Product Development