

### Delete/decrease existing coverage Step 1: Open process through your Dashboard

The screenshot shows the Empire Life Advisor Dashboard. The top navigation bar includes 'My Advisor Dashboard', 'My Profile', 'Contact Us', and 'Flow Logic'. The main content area is titled 'Hello Fiona!' and features 'Application Status - eSignatures' and 'New Business Status' sections. A 'What's New' sidebar on the right contains a 'Decrease/delete existing coverage' link, which is circled in red. A red arrow points from this link to a second screenshot of the same dashboard, where the 'Decrease/delete existing coverage' option is also circled in red.

### Delete/decrease existing coverage Step 2: Search for policy

The screenshot shows the 'Decrease/delete existing coverage' process. The top navigation bar includes 'My Advisor Dashboard', 'My Profile', 'Contact Us', and 'Test Hottest'. The main content area is titled 'Hello Test!' and features a 'Decrease/delete existing coverage' section. A progress bar shows three steps: 'Start', '1 Policy Info', '2 Confirm', and '3 eSignature'. The 'Policy Info' step is active. Below the progress bar, there is a search box labeled 'Enter policy number' with the value '2130120\$' and a 'QSearch' button. There are also 'Cancel', 'Back', and 'Continue' buttons.

Delete/decrease existing coverage  
Step 3: Policy search results

Empire Life My Advisor Dashboard My Profile Contact Us Test Hottest

Hello Test!

Decrease/delete existing coverage

Start 1 Policy Info 2 Confirm 3 eSignature

**Policy Info**  
Search by policy number to find the coverages or benefits eligible for delete/decrease coverage request.

Enter policy number  
21301203 Search Reset

Owners(s)	Policy #	Insured name(s)	Coverage/Benefit	Premium (annual)	Face amount
<input checked="" type="checkbox"/> John Smith, Jane Smith	21301203L	John Smith, Dan Smith	Estatemax	\$250	\$500,000
<input type="checkbox"/> John Smith, Jane Smith	21301203L	Jane Smith	Solution 10	\$250	\$250,000
<input type="checkbox"/> John Smith, Jane Smith	21301203L	Rebecca Smith, Jan Smith	Solution 10 - Child Rider	\$250	\$500,000
<input checked="" type="checkbox"/> John Smith, Jane Smith	21301203L	Dan Smith	Solution 20	\$250	\$500,000
<input type="checkbox"/> John Smith, Jane Smith	21301203L	Hailey Smith	Solution 10	\$250	\$500,000

Cancel Back Continue

Delete/decrease existing coverage  
Step 4: Chose to delete and/or decrease existing coverage

Empire Life My Advisor Dashboard My Profile Contact Us Test Hottest

Hello Test!

Decrease/delete existing coverage

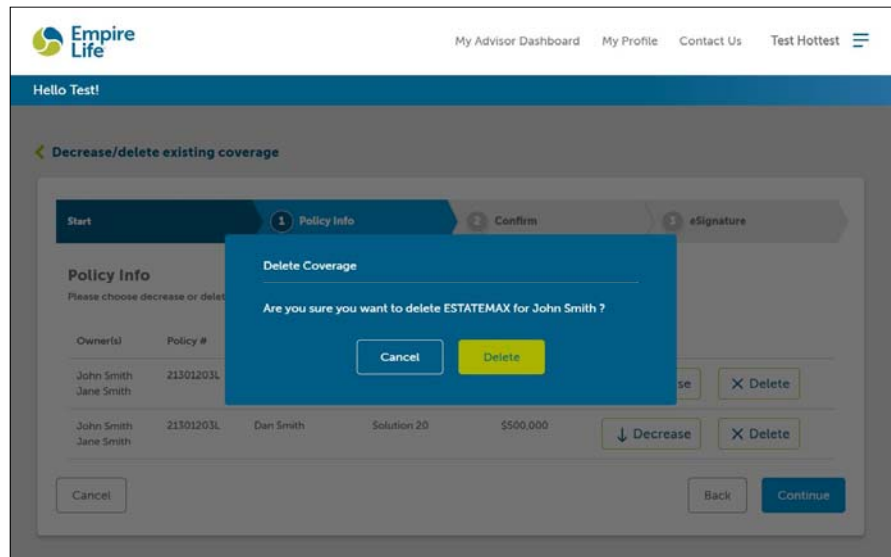
Start 1 Policy Info 2 Confirm 3 eSignature

**Policy Info**  
Please choose decrease or delete coverage options.

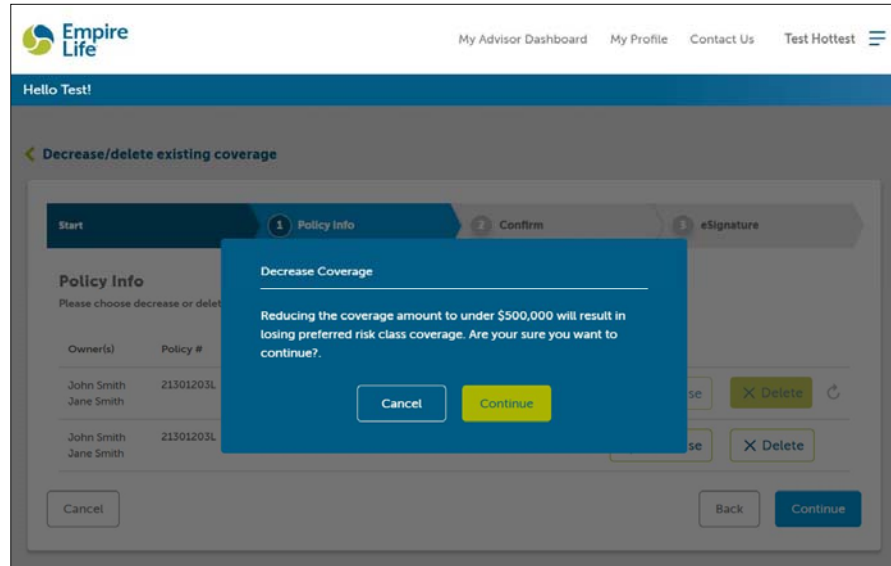
Owners(s)	Policy #	Insured name(s)	Coverage/benefit	Face amount	Actions
John Smith Jane Smith	21301203L	John Smith Dan Smith	ESTATEMAX	\$500,000	↓ Decrease X Delete
John Smith Jane Smith	21301203L	Dan Smith	Solution 20	\$500,000	↓ Decrease X Delete

Cancel Back Continue

Delete/decrease existing coverage  
Step 5: Confirm delete coverage is required



Delete/decrease existing coverage  
Step 6A: Confirm decrease coverage is required



Delete/decrease existing coverage  
 Step 6B: Decrease coverage/Confirm new face amount

Empire Life My Advisor Dashboard My Profile Contact Us Test Hottest

Hello Test!

< Decrease/delete existing coverage

Start 1 Policy Info 2 Confirm 3 eSignature

**Policy Info**  
 Please choose decrease or delete coverage options.

Owner(s)	Policy #	Insured name(s)	Coverage/benefit	Face amount	Actions
John Smith Jane Smith	21301203L	John Smith Dan Smith	ESTATEMAX	\$500,000	↓ Decrease X Delete ↻
John Smith Jane Smith	21301203L	Dan Smith	Solution 20	\$500,000	↓ Decrease New face amount \$400,000 ↻

Cancel Back Continue

Delete/decrease existing coverage  
 Step 7: Confirm new policy information

Empire Life My Advisor Dashboard My Profile Contact Us Test Hottest

Hello Test!

< Decrease/delete existing coverage

Start ✓ Policy Info 2 Confirm 3 eSignature

**Policy Info**

Owner(s)	Policy #	Insured name(s)	Coverage/Benefit	Current amount	Actions
John Smith Jane Smith	21301203L	John Smith Dan Smith	Estatemax	\$500,000	X Delete coverage
John Smith Jane Smith	21301203L	Dan Smith	Solution 20	\$500,000	↓ Decrease to \$400,000

Enter the email address for the owner(s) and select the applicable statements below.

Owner 1 - John Smith Owner 2 - Jane Smith

Email Address Email Address

The Owner(s) are not Canadian residents for Canadian income tax purposes  
 I have received my client's express consent in accordance with the Canadian Anti-Spam legislation to send email communication for the purpose of providing services

Ensure all information has been entered correctly. Select the 'I confirm' button to proceed to eSignature.

Cancel Back I Confirm

Delete/decrease existing coverage  
Step 8: Set up emails

Empire Life My Advisor Dashboard My Profile Contact Us Test Hottest

Hello Test!

Decrease/delete existing coverage

Start Policy Info **2 Confirm** 3 eSignature

**Policy Info**

Owner(s)	Policy #	Insured name(s)	Coverage/Benefit	Current amount	Actions
John Smith Jane Smith	21301203L	John Smith Dan Smith	Estatemax	\$500,000	Delete coverage
John Smith Jane Smith	21301203L	Dan Smith	Solution 20	\$500,000	Decrease to \$400,000

Enter the email address for the owner(s) and select the applicable statements below.

Owner 1 - John Smith  
 Email address: john.smith@company.com ✓

Owner 2 - Jane Smith  
 Email address: jane.smith@company.com ✓

The Owner(s) are not Canadian residents for Canadian income tax purposes

I have received my client's express consent in accordance with the Canadian Anti-Spam legislation to send email communication for the purpose of providing services

Ensure all information has been entered correctly. Select the "I confirm" button to proceed to eSignature.

Cancel Back I Confirm

Delete/decrease existing coverage  
Step 9: Create access code

Empire Life My Advisor Dashboard My Profile Contact Us Test Hottest

Hello Test!

Decrease/delete existing coverage

Start Policy Info Confirm **3 eSignature**

**eSignature Instructions**

Email access validation instructions  
 Please create an access code between 5 and 50 alphanumeric characters. This code will be required by the Owner(s) and Life Insured to complete the policy change, which will be sent via secure email.

Access code  
 58336 ✓

Advisor email validation  
 empireadvisor@company.com ✓

Cancel Back Continue

## Decrease/delete existing coverage Step 10: Complete eSignature

The screenshot shows the Empire Life user interface for the 'Decrease/delete existing coverage' process. At the top, the Empire Life logo is on the left, and navigation links for 'My Advisor Dashboard', 'My Profile', 'Contact Us', and 'Test Hottest' are on the right. Below the navigation is a blue bar with 'Hello Test!'. The main content area has a header 'Decrease/delete existing coverage' with a back arrow. A progress bar below the header shows four steps: 'Start', 'Policy Info', 'Confirm', and 'eSignature', with 'eSignature' being the current step. The 'eSignature instructions' section contains text explaining the electronic signing process and recommending 'on screen' signing. Below the text are two buttons: 'Sign on screen' and 'Sign via email\*'. A small icon of a laptop and pen is to the left of the buttons. At the bottom of the form are three buttons: 'Cancel', 'Back', and 'Continue'.

Empire Life

My Advisor Dashboard My Profile Contact Us Test Hottest


Hello Test!

< Decrease/delete existing coverage

Start Policy Info Confirm eSignature

**eSignature instructions**

To complete the online portion of the policy change, the Owner(s) must sign the policy change request electronically. Once the Owner(s) have signed, it will be submitted to Empire Life. We recommend the Owner(s) to sign "on screen" while meeting with the advisor. To sign on screen, the advisor must pass control of the online session to the Owner so he or she can complete the signing process.

 Sign on screen Sign via email\*

\*The Owner can also sign via email. An email will be sent to the signer using the email address the signer provided in the online form, the signer must click on the link provided in the email to access his or her signing package. We do not recommend this method as it will delay submission of the application to Empire Life.

Cancel Back Continue