Fast & Full® Investment Application

Client Checklist for Empire Life segregated fund policies

Before beginning the Fast & Full Investment Application process with your client(s) please use this checklist to ensure you have all of the required information you'll need to complete the application successfully.

Client Checklist

- ☐ Each owner/annuitant has a valid email address for e-Signature:
  All parties who sign the application electronically must have a unique and valid email address for their completed application package to be sent to.
- ☐ Information for all owner(s)/annuitant(s), including their:
  Name, address, contact information and phone number(s)
  SIN # (Mandatory for Registered and TFSA)
- ☐ Owner(s)/annuitant age(s) meets the product and contract type guidelines.
- ☐ Banking information, if a one-time or reoccurring pre-authorized debit will be selected.
- ☐ The governing pension legislation for any funds that are locked-in.
- ☐ Owner proof of age if the plan is to be a locked-in retirement income fund.
- ☐ Spousal information if it is a spousal plan (i.e. Spousal RRSP, Spousal RRIF) Spousal proof of age is required if retirement income payments are to be based on the spouse's age.
- ☐ A current and original piece of government issued photo identification for each owner along with their FATCA/CRS information, if the contract is non-registered.
- ☐ All required third party information if someone other than the owner(s)/annuitant will be funding or have an ownership interest in the policy
- ☐ Needs analysis for the suitability of the segregated fund product has been completed

FastandFull.ca/Investment

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Policies are issued by The Empire Life Insurance Company. A description of the key features of the individual variable insurance contract is contained in the Information Folder for the product being considered. **Any amount that is allocated to a segregated fund is invested at the risk of the contract owner and may increase or decrease in value**. Past performance is no guarantee of future performance.

Insurance & Investments – Simple. Fast. Easy.®

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Empire Life®