INFORMATION CIRCULAR

DATE: October 13th, 2020 **N° 2020-30**

CATEGORY: **INVESTMENT**

TO: Managing General Agents, Associate General Agents, Advisors, General Agents and National Accounts

SUBJECT: **Transaction Confirmations to be available electronically through My Advisor Dashboard and MyEmpire**

Effective October 19th, 2020 advisor copies of Transaction Confirmations are available electronically via My Advisor Dashboard. This change will ensure that advisors have access to the most up to date information about their clients' segregated fund investment policies.

As we continue our efforts to go green, paper copies will no longer be mailed to advisors in the MGA and National account channels. These groups will continue to receive paper transaction confirmations for a limited number of investment products that remain on some of our older administrative systems, such as Group RRSPs, and investment policies managed under the EMP fund code.

Access to Transaction Confirmations can be found in the **Documents** tab of My Advisor Dashboard. Transactions details will continue to be available on the Business Centre.

Frequently Asked Questions

Why is Empire Life making this change?

Empire Life wants to ensure that advisors have immediate access to Transaction Confirmations directly from My Advisor Dashboard. In addition to saving paper, this process change will result in a more convenient experience for advisors as it gives them access to the information in a secure and centralized location.

Who is included in the paperless initiative for Transaction Confirmations?

All advisors in the MGA and National account channel will no longer receive paper copies of Transaction Confirmations. All other advisors will continue to receive paper copies in the mail.

Can I request paperless if I am not a part of the MGA and National Account channel group?

Yes, if you would like to stop receiving paper copies of Transaction Confirmations, please submit your request to Empire Life Customer Service at 1-800-561-1268 or by email at investment@empire.ca.

Will the documents be available on the Business Centre?

No, Transaction Confirmations will only be available via My Advisor Dashboard.

Will this change affect customers?

No, customers are able to access transaction confirmations via their MyEmpire account. They will continue to receive paper until the eDelivery option is available later this year.

Can I request paper copies if I am a part of the MGA and National Account channels?

No, in order to obtain a paper copy, we ask that advisors log on to My Advisor Dashboard and download the document to be printed.

How can I get help logging in to My Advisor Dashboard?

If you're having trouble logging in to My Advisor Dashboard, please contact our Digital Support Team at 1 866 894-6182. If you know the email used to create the account, the password can be reset by visiting my.empire.ca and using the reset password link.

If you have additional questions, please contact Empire Life Customer Service at 1-800-561-1268 or by email at investment@empire.ca.

Reference

Stephanie Wisniewski, Director, Operations

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