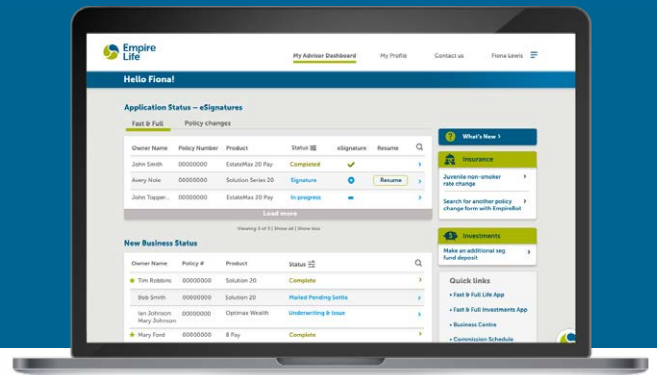


Submit T2033s faster than ever!

The fastest way to transfer your client's investments is now available on My Advisor Dashboard.



Our Online Additional Seg Fund Deposit Form now supports T2033 transfers – with a non-face-to-face option!



Transferring your client's funds from another institution can be a frustrating experience characterized by weeks of delays until the proceeds are released. While we can't make the release happen any faster, we can help you kick-start the transfer process with your clients. Our Online Additional Seg Fund Deposit Form can be completed in less than 5 minutes!



Our Form is suitable for non-face-to-face client meetings. You can continue to help clients that want to minimize face-to-face interactions or in person meetings. It's pre-filled with owner information and fund codes and no paperwork or cheques are required. You can make a range of deposits and transfers with it:

Possible transactions for this policy

- + One time deposit
- + Recurring PAD deposit
- Transfer from another institution
- Transfer from an Empire Life policy



To start an additional deposit or transfer, go to empire.ca/mydashboard

We've prepared some tips to help you get the most from our Online Additional Seg Fund Deposit Form:

- Please use one form per transaction if you need to do more than one transaction into an Empire Life policy, such as a deposit and a transfer into a policy or two transfers into a policy.
- Policies that ends with an "i", GICs (standalone), Class Plus and Class Plus 2 policies are not eligible
- As the servicing advisor, the search results will be limited to your active code.

Tips for making a T2033 transfer:

- Registered accounts only
- Only full transfers are permitted – no partial transfers.
- If you're transferring from a different institution, you can allocate the funds now or later.
- Transfer requests cannot be submitted on smart phones, only laptop and tablet. However, customers can use their smart phones to sign the forms on DocuSign.

Tips for making a one-time deposit or setting up a PAD:

- Policies must be eligible for additional deposits in order to use the Form



My Advisor Dashboard is our online access tool for advisors. We continue to enhance it with the features that advisors have been asking for – making you more productive!

Learn more at empire.ca/aboutdashboard



To start an additional deposit or transfer, go to empire.ca/mydashboard

FOR ADVISOR USE ONLY

® Registered trademark of **The Empire Life Insurance Company**. Policies are issued by The Empire Life Insurance Company.

The Empire Life Insurance Company

259 King Street East, Kingston, ON K7L 3A8

Insurance & Investments – Simple. Fast. Easy.®

empire.ca info@empire.ca 1 877 548-1881

INV-2772-EN-05/20

