

June 30 statements bring value of segregated fund policies into focus

New client segregated fund statements will provide a more detailed picture of the features of segregated fund policies. This allows you to provide a clear view of the value of the services and planning you provide and focuses on the value of your recommendations.

These enhanced, more detailed statements are for segregated funds introduced in October 2009 and include:

- More information about policy guarantees and riders
- Policy overview with an at-a-glance list of policy guarantee levels and options selected
- Fees that are shown separately – including investment management fees and advisory and management service fees important for clients with larger accounts invested in preferred series 2 segregated funds
- Preferred series statements issued quarterly and printed in colour to reflect the value of affluent clients' policies
- New sections for lifetime income benefit option and tax-free savings accounts
- Automatic rebalancing arrangements
- Listing of beneficiaries

These statements position us well for online statements and the addition of policy-specific rates of return we're striving to deliver in 2014.

Information you can plan on

This [guide](#) (46-8976) of selected sample images summarizes new and improved sections of Canada Life segregated fund policy client statements and will help focus conversations on what will be meaningful to each client during reviews.

This [client statement insert](#) (46-8899) is included with 2013 Canada Life segregated fund policy statements to help clients understand the information in their statements. Print versions are also available for order from [Supply](#).

Copies of your client statements will be sent to your MGA the week of July 15. Clients will receive their copies the week of July 22.