

## About Primerica

### Primerica is the largest independent financial services marketing organization in North America:

- Primerica, Inc. is listed on the New York Stock Exchange (PRI).
- Over 5.7 million lives insured through our life companies.
- Approximately 2.8 million client investment accounts.
- \$917 billion of term life insurance in force.
- An average of \$5.3 million in benefit claims paid every day.
- Investment clients have nearly \$84 billion in asset values in their Primerica investment accounts.

Numbers reflect the combined totals or daily average, as indicated above, as of, or for the year ended, December 31, 2022, for the following affiliated companies: **Life Insurance:** National Benefit Life Insurance Company (Home Office: Long Island City, NY) in New York; Primerica Life Insurance Company (Executive Offices: Duluth, GA) in all other U.S. jurisdictions; Primerica Life Insurance Company of Canada (Head Office: Mississauga, ON) in Canada. **Investments:** In the United States, securities are offered by PFS Investments Inc. (PFSI), 1 Primerica Parkway, Duluth, Georgia 30099-0001; In Canada, mutual funds are offered by PFSL Investments Canada Ltd., mutual fund dealer, and segregated funds are offered by Primerica Life Insurance Company of Canada, Head Office: Mississauga, ON. Each company is responsible for its own financial obligations.

Not all products/services are available in all provinces/territories. **1** Primerica's term life insurance and Segregated Funds are underwritten by Primerica Life Insurance Company of Canada, Head Office: Mississauga, ON. **2** Mutual Funds are offered by PFSL Investments Canada, Ltd., Mutual Fund Dealer, Head Office: Mississauga, ON. **3** Primerica Enhance™ is a trademark of Primerica, Inc. Primerica's independent sales representatives promote and market insurance products administered by The Edge Benefits Inc. for the purposes of the Primerica Enhance™ program and are underwritten by various Canadian insurers unaffiliated with Primerica. **4** Primerica does not deal in mortgages or debt consolidation lending. Primerica representatives make simple referrals to 8Twelve Mortgage Corp. and Rocket Mortgage Canada ULC for mortgages and debt consolidation loans secured by residential real estate. **5** Pre-Paid Legal Services and IDTheft Defense<sup>SM</sup> are each offered by contractual agreement between Primerica Client Services Inc., PFSL Investments Canada Ltd., and PPL Legal Care of Canada Corporation dba PPLSI, a subsidiary of Pre-Paid Legal Services, Inc. Primerica representatives refer clients to PPLSI. **6** Auto & Home Insurance is offered through a referral arrangement by contractual agreement between Surex.com Ltd., Surex.com (Ontario) Ltd., Primerica Life Insurance Company of Canada and PFSL Investments Canada Ltd. Auto & Home Insurance is not directly offered by Primerica.

Primerica markets first-rate financial products and services from some of the world's more recognizable companies:

#### Term Life Insurance<sup>1</sup>

- Primerica Life Insurance Company of Canada

#### Mutual Fund Investments<sup>2</sup>

- AGF Investments Inc.
- Mackenzie Investments

#### Segregated Funds<sup>1</sup>

- Primerica Life Insurance Company of Canada

#### Health Benefits<sup>3</sup>

- Primerica Enhance™ provided by The Edge Benefits

#### Mortgage Loans<sup>4</sup>

- B2B Bank
- 8Twelve Mortgage Corporation
- Rocket Mortgage Canada ULC

#### Legal Protection<sup>5</sup>

- Pre-Paid Legal Services (PPLS)
- ID Theft Defense<sup>SM</sup> (IDTD) provided by PPL Legal Care of Canada Corporation

#### Auto & Home Insurance<sup>6</sup>

- Primerica Secure™ provided by Surex

### Primerica Life Insurance Company of Canada

6985 Financial Drive, Suite 400,  
Mississauga, ON L5N 0G3

Segregated Funds: English: 1 800 463 9997 | French: 1 800 463 7774

Term Life Insurance: 905-812-2900.

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## Affiliations and Organizations

### Office of the Superintendent of Financial Institutions

Primerica Life Insurance Company of Canada is regulated by the Office of the Superintendent of Financial Institutions ("OSFI"). OSFI is an independent agency of the Government of Canada established in 1987 to contribute to the safety and soundness of the Canadian financial system. OSFI supervises and regulates federally registered banks and insurers, trust and loan companies, as well as private pension plans subject to federal oversight, and ensures they are complying with their governing legislation.

For more information, please visit [www.osfi-bsif.gc.ca](http://www.osfi-bsif.gc.ca).

### Ombudsman for Banking Services and Investments

PFSL Investments Canada Ltd. is an Ombudsman for Banking Services and Investments (OBSI) Member Company. OBSI resolves disputes between participating banking services and investment firms and their customers if they can't solve them on their own. They are independent and impartial, and their services are free to consumers. As an alternative to the legal system, the OBSI works informally and confidentially to find a fair outcome.

For more information, please visit [www.obsi.ca](http://www.obsi.ca).

### OmbudService for Life & Health Insurance

Primerica Life Insurance Company of Canada is an OmbudService for Life & Health Insurance (OLHI) Member Company. OLHI is a national independent complaint resolution and information service for consumers of Canadian life and health insurance products and services, including life, disability, employee health benefits, travel, and insurance investment products such as annuities and segregated funds. OLHI is a member of the Financial Services

OmbudsNetwork (FSON), a Canada-wide dispute resolution service supported by Canada's financial services regulators and financial services firms.

For more information, please visit [www.olhi.ca](http://www.olhi.ca).

### Investment Funds Institute of Canada

PFSL Investments Canada Ltd. is a member of the Investment Funds Institute of Canada ("IFIC"). IFIC is the voice of Canada's investment funds industry, including fund managers, distributors and industry service organizations. IFIC proactively influences and advances industry issues within the regulatory framework, members' efficiencies, knowledge and proficiency.

For more information, please visit [www.ific.ca](http://www.ific.ca).

### Assuris

Primerica Life Insurance Company of Canada is a member of Assuris. Assuris is a not for profit organization that protects Canadian policyholders in the event that their life insurance company should fail. Their role is to protect policyholders by minimizing the loss of benefits and ensuring a quick transfer of their policies to a solvent company, where their benefits will continue to be honoured. Assuris is funded by the life insurance industry and endorsed by government. There is no cost to policyholders for Assuris' protection.

For more information, please visit [www.assuris.ca](http://www.assuris.ca).