

**Notice to Brookfield Annuity Company Group Annuity Policy (GAP) Policyholders, GAP Certificate Holders and Third Parties**

Effective March 1, 2025, Brookfield Annuity Company will change its name to Blumont Annuity Company.

Operating as Blumont Annuity Company, we will continue to offer the same market-leading annuity solutions that we have become known for since our inception in 2016. We remain dedicated to serving our policyholders and continuing to provide exceptional plan member services that policyholders have come to expect. Changing our name to Blumont Annuity Company reflects our dedication to providing retirement solutions in Canada as the company enters its 10<sup>th</sup> year of providing a stable source of lifetime income for tens of thousands of Canadian defined benefit (DB) plan members.

There are no changes in the ownership of Brookfield Annuity Company as we remain a wholly owned subsidiary of Brookfield Wealth Solutions Ltd. (NYSE, TSX: BNT). Aside from our name, there will be no other changes to the terms and conditions of any annuity policies issued by Brookfield Annuity Company, including the certificates of insurance issued to individual pension plan members (annuitants) under an annuity policy.

For additional information, please see the attached FAQ document. Effective March 1, 2025, you may visit our new public site at [blumontannuity.ca](http://blumontannuity.ca), or our secure member site at [blumontannuitymembers.ca](http://blumontannuitymembers.ca).

If you have any questions, please email [info@brookfieldannuity.com](mailto:info@brookfieldannuity.com), or contact your regular contact at the company.

## FAQ

### **Q1. Why is Brookfield Annuity Company changing its name to Blumont Annuity Company?**

Operating as Blumont Annuity Company in Canada, we will continue to offer the same market-leading annuity solutions that we have become known for since our inception in 2016. We remain dedicated to serving our policyholders and continuing to provide exceptional plan member services that policyholders have come to expect. Changing our name to Blumont Annuity Company reflects our dedication to providing retirement solutions in Canada as the company enters its 10<sup>th</sup> year of providing a stable source of lifetime income for tens of thousands of Canadian defined benefit (DB) plan members.

### **Q2. Does the name change reflect a change in the ownership of Brookfield Annuity Company?**

No. There are no changes in the ownership of Brookfield Annuity Company as we remain a wholly owned subsidiary of Brookfield Wealth Solutions Ltd. (NYSE, TSX: BNT).

## For Plan Sponsors

### **Q3. What changes should I expect as a plan sponsor with an existing group annuity policy?**

If you are a plan sponsor with an existing group annuity policy (GAP) issued by Brookfield Annuity Company, the attached Notice serves as our official notice of the name change. Pension plan members (annuitants) insured under a GAP issued by Brookfield Annuity Company will also receive notice of the name change, as well as a copy of this FAQ document. Aside from our name, there will be no other changes to the terms and conditions of the GAP, including the certificates of insurance issued to individual annuitants.

Plan sponsors will not receive an updated GAP, or an amendment to an existing GAP to reflect the name change.

### **Q4. Does the name change affect benefit security for pension plan members under an existing group annuity policy?**

No. Aside from the change in our name to Blumont Annuity Company, there are no changes to the ownership, corporate structure, or operation of the company. Blumont Annuity Company remains regulated by the federal insurance regulator, the Office of the Superintendent of Financial Institutions (OSFI), with a license to operate in each Canadian province and territory. Blumont Annuity Company will continue to be a member company of Assuris, and benefits secured under a group annuity policy remain subject to Assuris coverage. The complaint-handling process at Blumont Annuity Company continues to be subject to third-party review by the OmbudService for Life and Health Insurance (OLHI) or l'Autorité des marchés financiers (AMF) (in Quebec only).

As at Q3 2024, the company maintained a LICAT ratio of 150%. The company has a rating of A with a stable outlook from A.M. Best.

**Q5. As a plan sponsor who is considering a group annuity policy purchase, what changes should I expect?**

If you are considering going-to-market to purchase a group annuity policy, continue to work with your pension plan's chosen service provider. There will be no change in how Blumont Annuity Company responds to requests for quotations (RFQs) or its participation in the Canadian pension risk transfer (PRT) market.

Please continue to use the @brookfieldannuity.com email address until further notice.

**For Pension Plan Members (Annuitants)**

**Q6. What does the name change mean for pension plan members (annuitants)?**

If you are a pension plan member (annuitant) who is insured under a group annuity policy with Brookfield Annuity Company, you will not experience any changes in the services you receive from the company. You may continue to contact us via mail, fax, email, phone, or our secure member portal. Please see our contact information below.

The attached Notice serves as our official notice of the name change. Annuitants will not receive an updated certificate of insurance, or an amendment to an existing certificate of insurance.

**Q7. Does the name change affect benefit security for pension plan members under an existing group annuity policy?**

Please see our response to Question #4 above.

**Q8. From which entity should I expect to receive a T4A?**

If you received annuity payments in taxation year 2024, you will receive a T4A slip from Brookfield Annuity Company. For payments received in taxation year 2025 or later, you will receive a T4A slip from Blumont Annuity Company. If you have any questions about your 2024 or 2025 T4A slip, please contact us at the contact information below.

**Q9. Will the form of my annuity payments change?**

If you are receiving annuity payment(s) by cheque, on or after March 1, 2025, the name of the payor on the cheque will change to Blumont Annuity Company. There will be no other changes to your payments. If you wish to change your payment method from cheque to direct deposit, please contact us at the contact information below.

If you are receiving annuity payments via direct deposit or wire transfer, on or after March 1, 2025, the name of the payor will change to Blumont Annuity Company. There will be no other changes to your payments.

**Q10. How do I contact Brookfield Annuity Company / Blumont Annuity Company?**

If you are a pension plan member (annuitant) who is insured under a group annuity policy with Brookfield Annuity Company, you may continue to contact us via email, phone, fax, mail, or our secure member portal.

Email	<p>Until February 28, 2025: <a href="mailto:info@brookfieldannuitymembers.com">info@brookfieldannuitymembers.com</a></p> <p>On and after March 1, 2025: <a href="mailto:info@blumontannuitymembers.ca">info@blumontannuitymembers.ca</a></p>
Phone	<p>1 (877) 392-2423 (if calling in Canada or across North America) (toll free)</p> <p>1 (289) 374-3077 (if dialing internationally)</p>
Fax	1 (905) 272-6300
Regular Mail	<p>Until February 28, 2025: Brookfield Annuity Company 201 City Centre Drive, Suite 1000 Mississauga, ON, L5B 4E4 Attention: Member Services Centre</p> <p>On and after March 1, 2025: Blumont Annuity Company 201 City Centre Drive, Suite 1000 Mississauga, ON, L5B 4E4 Attention: Member Services Centre</p>
Secure Member Portal	<p>Until February 28, 2025: Brookfieldannuitymembers.com</p> <p>On and after March 1, 2025: blumontannuitymembers.ca</p>
<p>Our Member Services Representatives are available Monday to Friday from 8:00am to 8:00pm Eastern Time, except federal and Ontario holidays.</p>	

**Q11. What changes should I expect when Blumont Annuity Company communicates with me?**

In addition to the change in name, the company's visual representation will change in any future written communication with you. You will be able to identify official communication from the company with this new logo:

