

PLAN SPONSOR PROFILE FOR AIMSE 2024

NAME OF PLAN: FORESTERS FINANCIAL

REPRESENTATIVE CONTACT INFORMATION

C.J. Heng – Cheng@Foresters.com ; C: 647.457.7287

PLAN OVERVIEW

- \$6 Billion CAD
- No consultant
- BOARD MAKEUP - https://www.foresters.com/en-ca/about/senior-leadership#Boardofdirectors_content

WHAT'S DIFFERENT ABOUT OUR PLAN

- Canadian life insurance company (long duration, credit quality constraints)
- Insurance regulations (Canadian and U.S. both apply)
- Structured between 3 separate entities with individual requirements

NAVIGATING INSIDE OUR PLAN – WHO IS THE BEST PERSON TO CONTACT

- C.J. Heng (Cheng@Foresters.com) 647.457.7287

WHAT'S HOT/WHAT'S NOT (Investment Strategies/IndustryTrends/Other)

- U.S. Real Estate
- Rated Note Structures
- Regulatory Requirements on Sustainability/Climate Risk Reporting (OSFI B-15)