Digital segregated fund application roadmap

canada life™

	Application types	Dashboard and DocuSign dashboard	Functionality and features	Transaction types / application options	Operational efficiencies
Release **Complete!** (1)	• RRSP • Spousal RRSP • Electronic fund transfer (EFT) • Transaction authorization • Real Estate form	• In-progress applications • Edit and cancel • Complete	• Dynamic guided form • Plain language • Delegate access; save features • PDF forms embedded • DocuSign e-signature • Basic fund selector	• New apps (initial deposit)	• Less paperwork, fewer errors and not-in-good orders • DocuSign application package delivery
Release **Complete!** (2)	• TFSA plus supporting forms • Locked-in retirement income account (LIRA)	• Ongoing support	• Ongoing support	• Ongoing support	• Ongoing support
Future enhancements	• Non-registered (single) – **Complete!** • Non-registered (joint) • Income applications	• Enhanced statuses such as delivery errors	• Intelligent fund selector • Unique application summary/output • Pre-populated data	• Improved external transfer process by adding the Transfer authorization for registered investments (TARI) form – **Complete!** • Subsequent premiums • Scheduled switches, rebalancing, redemptions	• Further automation to simplify back-end processing system

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