

My Canada Life client site support



What is My
Canada Life?



Eligibility



Invite your clients



Registration



Policy details



Product features



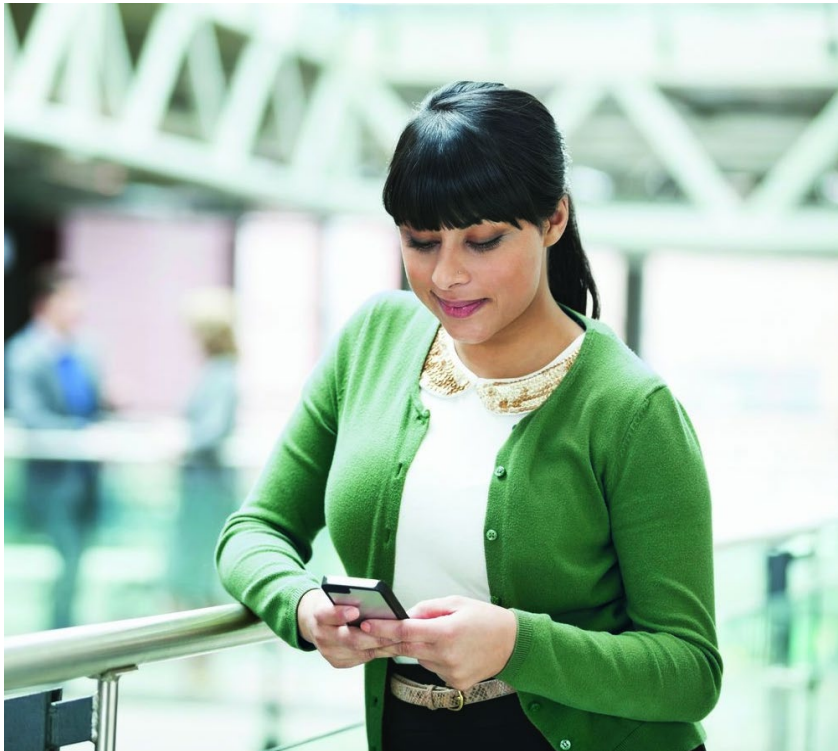
Client assistance



Frequently asked
questions



What is My Canada Life?



My Canada Life™ is a site where clients can easily access information about their individual Canada Life insurance and investment products – all in one spot. Clients can view and download available statements and tax documents at their convenience. They can also switch to paperless statements and update their email address. For the first time, clients will have a 360-degree view of the products they have with Canada Life.

Just like with Workspace, **My Canada Life** is constantly evolving and launching new features.



Which of my clients are eligible to register for My Canada Life?

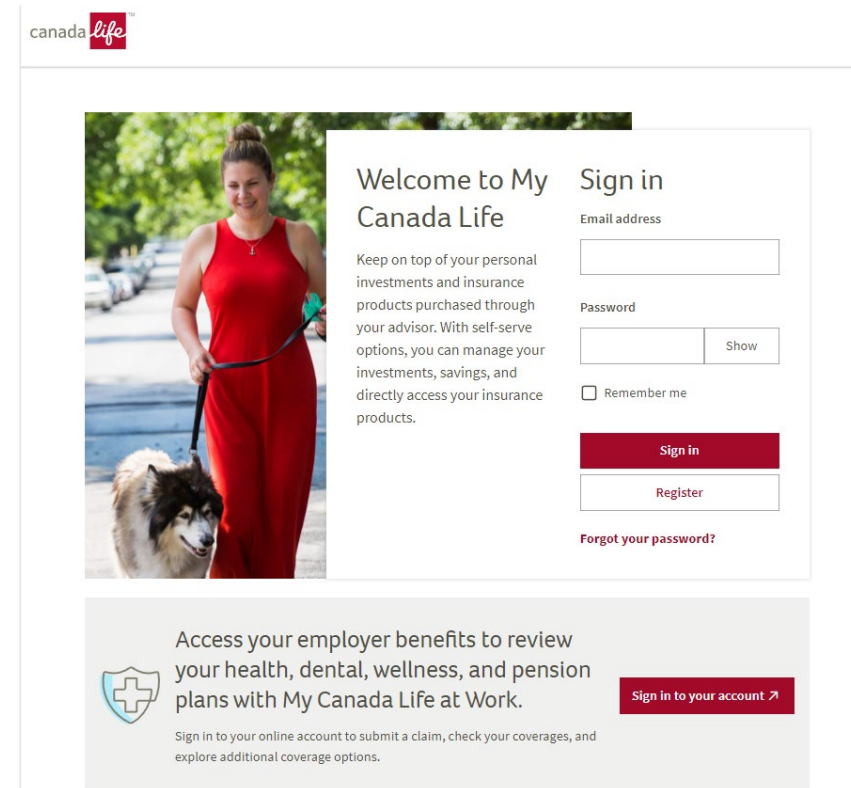
Clients can register for the site if they meet the following criteria:

- Over the age of 18
- Own or jointly own individual insurance and/or wealth products
- Have a Canadian address/postal code on file

Eligible clients will be sent a registration link with their statement so they can easily register on their own.

The following are not eligible at this time:

- Policies owned by a business or corporation
- Policies managed in trust (legal guardian) or by a power of attorney



The screenshot shows the My Canada Life website interface. At the top left is the "canada life" logo. The main content area is divided into two columns. The left column features a photograph of a woman in a red dress walking a dog, with the text "Welcome to My Canada Life" and a paragraph about self-serve options. The right column contains a "Sign in" section with fields for "Email address" and "Password", a "Remember me" checkbox, and "Sign in" and "Register" buttons. Below the "Sign in" section is a link for "Forgot your password?". At the bottom, there is a section for "Access your employer benefits" with a shield icon and a "Sign in to your account" button.

Invite your clients



Are you interested in inviting your clients to register?

If you would like to connect with your clients about registering for **My Canada Life**, you can email them using [this template](#).

Having trouble? Try [this link](#) (for Mac users).

A screenshot of an email template for My Canada Life. The header features the Canada Life logo. Below it is a red banner with the text 'Introducing My Canada Life' and a photo of a woman. The main body of the email contains the following text: 'Get 24/7 access to your insurance and investment information', 'I know how important it is to be able to access your financial information when you need it.', 'Register now for My Canada Life™ to get 24/7 access to your information about your insurance and investments. Now, you'll be able to:', followed by a bulleted list: '• Go paperless to reduce the items mailed to your door', '• Download statements and tax documents', '• Update your email address', '• Access your information from any computer or mobile device'. Below the list, it says 'It also makes it easier for us to view the same information as we work together digitally.', 'You can also contact our dedicated support line at 1-888-534-1836 with any questions about the site.', and 'Join My Canada Life today for an enhanced digital experience.' At the bottom is a red button with the text 'Register now'.

Registration



How do clients register for My Canada Life?

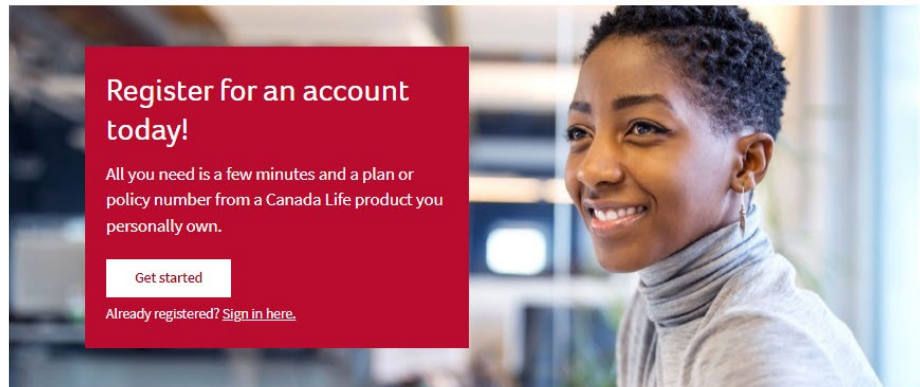


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Sign in

Say hello to My Canada Life

Keep on top of your finances with My Canada Life. Get 24/7 access to info about your Canada Life investments, savings and insurance products in one convenient place.



Who can register for My Canada Life? ✓

Where can I find my plan or policy number? ✓

Tell me more about the registration process ✓

Clients can register for **My Canada Life** via the [registration page](#). Clients can also access the registration page from the sign-in button on [canadalife.com](#). They just need their policy number, date of birth and postal code to get started.

Don't live in Canada? Call us at 1-416-597-6981 (collect calls accepted).

Once registered, your clients can access **My Canada Life** from the [sign-in page](#).

Which clients are registered?



How do I know which of my clients are registered (or not registered) with My Canada Life?

UNDER RE-DEVELOPMENT AS FUNCTIONALITY IS NOT CURRENTLY WORKING. PLEASE CHECK BACK LATER FOR UPDATES.



Policy details



What basic policy details will my client be able to see on My Canada Life?

Your clients can see basic details for these policy types on **My Canada Life**.

Remember, **My Canada Life** will continue to evolve and more in-depth policy details will be added over time.

Wealth product availability	
Segregated funds - London Life, Great-West Life and Canada Life (including Canada Life segregated fund policies sold through an MGA). Co-mingled segregated funds with GIO and/or DIO	Available
FAA and FIF .(Great-West Life)	Available
Freedom Funds – Marketwatch (London Life)	Available
Guaranteed Interest Options, Daily Interest Accounts	Available
Annuities, Mutual funds and First Home Savings Accounts (FHSA)	Coming soon

Insurance product availability	
Participating life insurance	
London Life, Great-West Life, Canada Life	Available
Term life insurance	
London Life, Great-West Life, Canada Life	Available
Universal life insurance	Available for policies issued after Jan 1, 2020
Critical illness insurance and disability insurance	
Great-West Life	Available
Canada Life	Available

Policy details



What basic policy details will my client be able to see on My Canada Life?

Policy details currently available on **My Canada Life**:

Wealth	
Address (mailing)	Issue date
Amount transferred in	LIB details
Automatic switch and transfer program details	Market value
Banking details	Maturity guarantees
Beneficiary details	Minimum withdrawal amount
Contributions	Policy number
Death benefit guarantees	Policy owner & annuitant
GIO table (includes total value)	Rate of return
Fund asset allocations	Tax free savings accounts (contributions, withdrawals, transfers in and out)
Income payment details	Transaction history (most recent 100 items)
Investment funds allocation table (includes total value)	Withdrawals

Insurance	Available for:
Address (mailing) Assignment Billing information Contingent owner Issue date Payout on death** Policy number Policyowner Registered Total coverage Total premium	Term, participating, universal life*, critical illness, disability *For policies issued after Jan 1, 2020 **Whole life policies only
Additional deposition option (ADO) Dividends Loans* Net cash surrender value*	Participating, universal life* *For policies issued after Jan 1, 2020
Conversion expiry date Term renewal (date or amount only)	Term, critical illness
Benefit amount Benefit start date and waiting period	Disability

Product features



What features are available on My Canada Life today?



The following products have paperless statement options:

Wealth products	
Guaranteed Interest Options and Daily Interest Accounts for London Life legacy and Canada Life sold after January 1, 2020	Statements and tax documents are available
Segregated funds and Freedom Funds – Marketwatch	
Annuities	Tax documents are available
Mutual funds - T4RSP, T4RIF, RLs, NR4 for nominee business only	
Insurance products	
Participating life insurance (excluding Gibraltar Select)	Statements and tax documents are available
Universal life insurance (excluding London Life policies issued prior to 2004)	
Policies starting with E or H and ending in U (London Life)	Premium billing notices are available
Policies ending in T or P (London Life and Great-West Life)	
Policies ending in U (Great-West Life)	
Disability insurance	Tax documents are available



Your clients can do the following on **My Canada Life**:

Self-serve options	
Update address, email and site language	Available
Print product summaries	
Phone number	Coming soon
Banking and payments	
Beneficiary details	

Client assistance

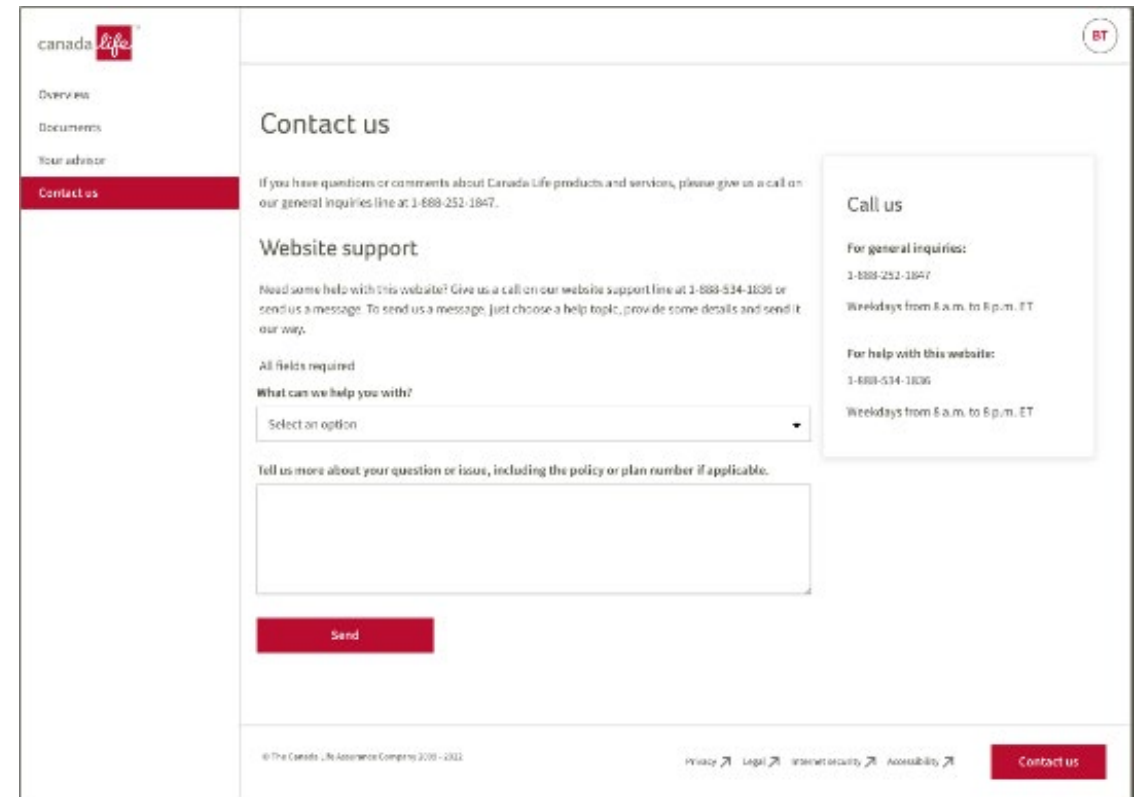


What if my client needs assistance with My Canada Life?

If your client needs help with the **My Canada Life** website, please have them give us a call on our website support line at **1-888-534-1836** or send us a message.

To send us a message, ask your client to login to **My Canada Life** and select **Contact us**. They can choose a help topic, provide some details and send it our way.

Our hours of operation are weekdays from 8 AM to 8 PM EST.



The screenshot shows the 'Contact us' page on the My Canada Life website. On the left is a navigation menu with links: Overview, Documents, Your advisor, and Contact us (which is highlighted in red). The main content area is titled 'Contact us' and includes a paragraph about contacting the support line. Below this is a 'Website support' section with a message about the website support line and a form to send a message. The form has a dropdown menu for 'What can we help you with?' and a text area for 'Tell us more about your question or issue...'. A red 'Send' button is at the bottom of the form. On the right side of the page, there is a 'Call us' box with contact information for general inquiries and website-specific help, including phone numbers and hours of operation. At the bottom of the page, there is a footer with copyright information, links for Privacy, Legal, Internet security, and Accessibility, and a red 'Contact us' button.

canada life

Overview
Documents
Your advisor
Contact us

Contact us

If you have questions or comments about Canada Life products and services, please give us a call on our general inquiries line at 1-888-252-1847.

Website support

Need some help with this website? Give us a call on our website support line at 1-888-534-1836 or send us a message. To send us a message, just choose a help topic, provide some details and send it our way.

All fields required

What can we help you with?

Select an option

Tell us more about your question or issue, including the policy or plan number if applicable.

Send

Call us

For general inquiries:
1-888-252-1847
Weekdays from 8 a.m. to 8 p.m. ET

For help with this website:
1-888-534-1836
Weekdays from 8 a.m. to 8 p.m. ET

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Privacy Legal Internet security Accessibility

Contact us

Frequently asked questions



My Canada Life questions and answers

What's the difference between My Canada Life and My Canada Life at Work?

My Canada Life at Work provides information about group benefits and savings plans. **My Canada Life** provides information about individual Canada Life insurance and wealth policies.

How do I know if my client is using My Canada Life?

Workspace identifies which of your clients have already registered (coming soon for MGA/NA).

What if my client is living outside of Canada?

Clients who are living outside Canada can register by calling 1-416-597-6981 (collect calls accepted). A My Canada Life support representative will help them get started.

My client received a new policy number for their wealth product. Which one do they use to register?

Many wealth policies have new policy numbers (as a result of moving to a new policy administration system). Clients will need to use their new policy number to register.

Can clients buy products or process trades on My Canada Life?

No.

Can my clients contact me through My Canada Life?

My Canada Life has a page with your contact information. This page will improve over time to make it even easier for clients to connect with you.

What if my client has questions about their policies?

For questions about their policies, clients can contact their advisor or the Client Service Centre at 1-888-252-1847 between 8 a.m. and 8 p.m. EST.

Where can I go for more information?

Keep an eye on the **My Canada Life** [landing page](#) for updates.