My Canada Life client site support

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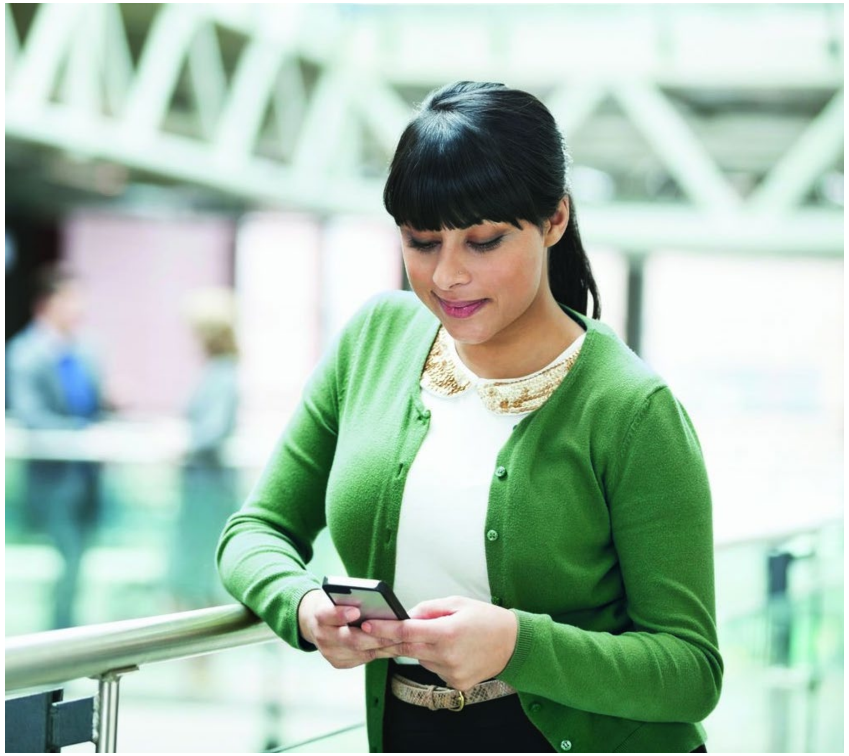
My Canada Life

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.

Eligibility

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

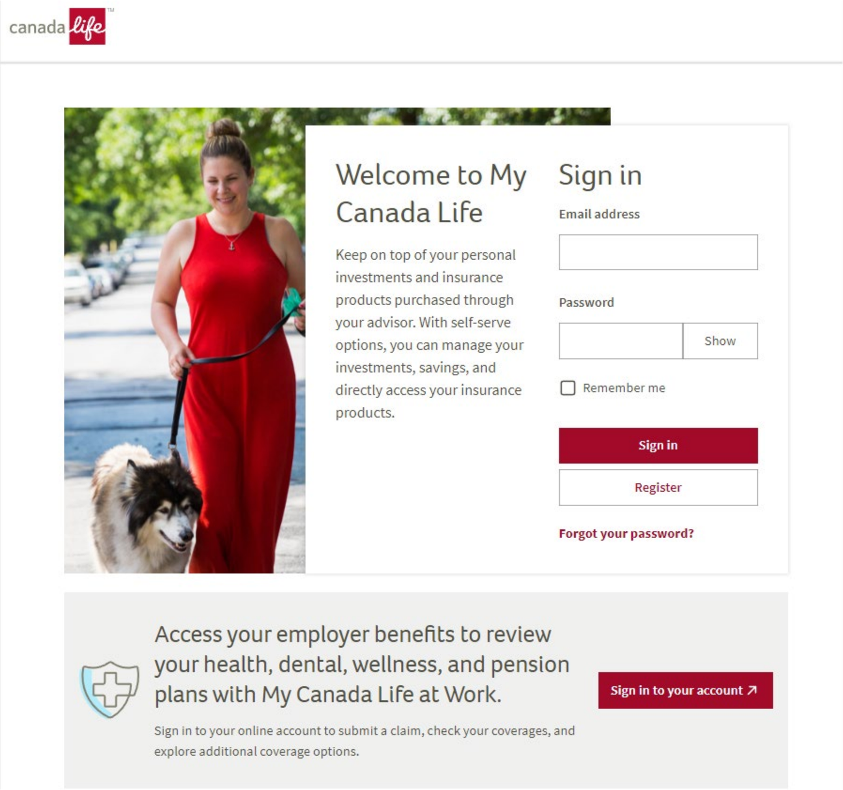
Clients can register for the site if they meet the following criteria:

- 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

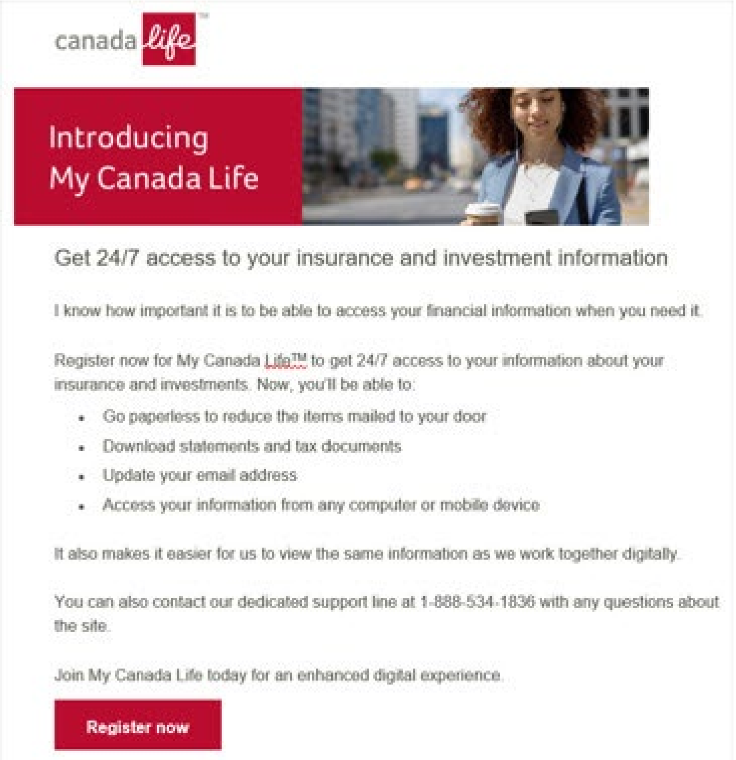


Invite your clients

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).


canada life™

Introducing
My Canada Life

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:

- 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

It also makes it easier for us to view the same information as we work together digitally.

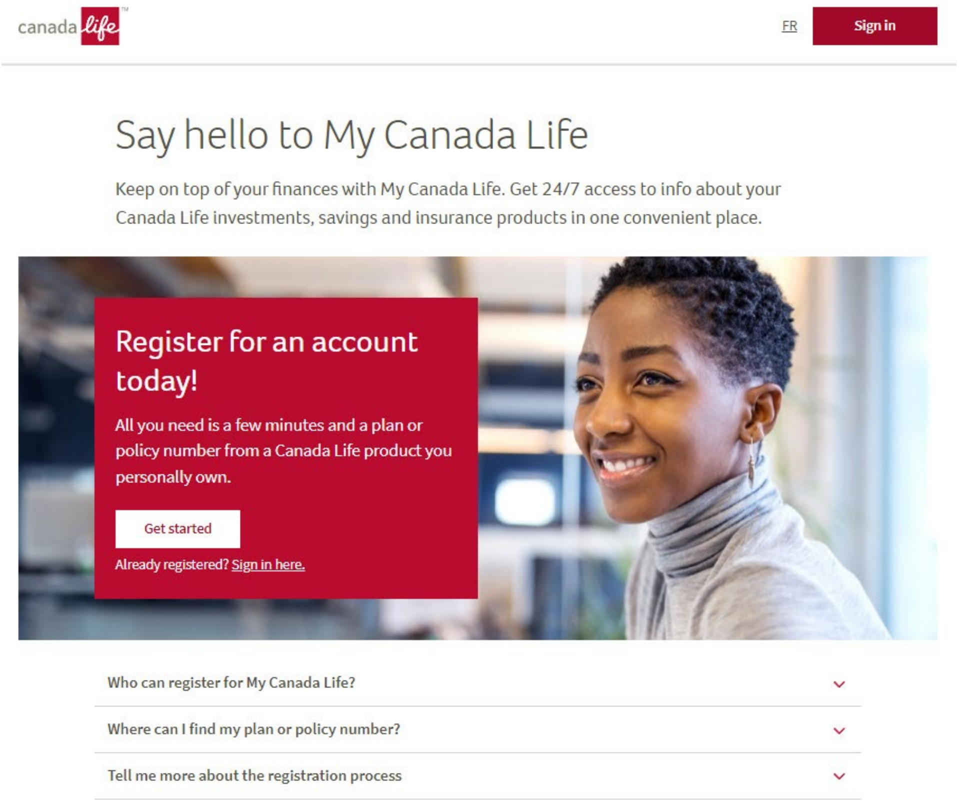
You can also contact our dedicated support line at 1-888-534-1836 with any questions about the site.

Join My Canada Life today for an enhanced digital experience.

Register now

Registration

How do clients register for My Canada Life?



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 Segregated funds and Freedom Funds – Marketwatch	Statements and tax documents are available
Annuities Mutual funds - T4RSP, T4RIF, RLs, NR4 for nominee business only	Tax documents are available

Insurance products	
Participating life insurance (excluding Gibraltar Select) Universal life insurance (excluding London Life policies issued prior to 2004)	Statements and tax documents are available
Policies starting with E or H and ending in U (London Life) Policies ending in T or P (London Life and Great-West Life) Policies ending in U (Great-West Life)	Premium billing notices are available
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 Print product summaries	Available
Phone number Banking and payments Beneficiary details	Coming soon

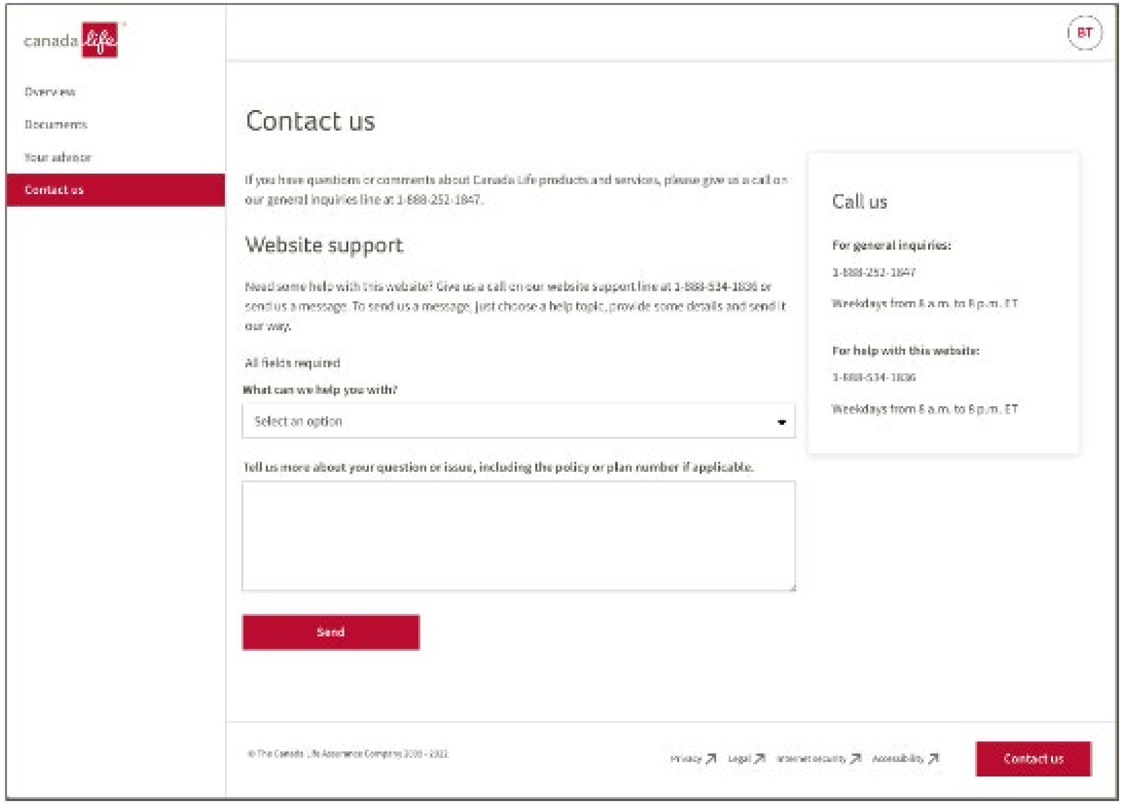
Client assistance

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.



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.