Online support for

Professional Advisers

There has never been a better time to consider using the online systems Canada Life offer.

Doing business online will:

- Provide you with the flexibility to continue to manage client recommendations
- Avoid the need to pick up the phone or post paperwork
- Save you time and provide a more streamlined service

We have listed some of our main online systems and given an overview of what you can do.

Details on how to access our online systems can be found **here** or contact your account manager for more information.

Call us

The Retirement Account
0345 606 0708

Onshore bonds
0345 606 0708

Offshore bonds
0333 015 1382

By email

ifaservice.ra@canadalife.co.uk

Customer.services@canadalife.co.uk

focus@canadalifeint.com

[For advisers]

Canada Life portal

Manage your policies simply and easily

The Canada Life Portal now gives you access to both Adviser Connect and The Retirement Account Dashboard using one single sign on.

The Retirement Account

Dashboard

The Retirement Account Online Dashboard helps you to create quotes, apply online and track progress, set up funds to auto-rebalance, look up the value of your client's investments, use our phased drawdown facility, administer some aspects on existing policies, access our Fund Research Centre and more. Further information in relation to The Retirement Account Dashboard including instructions for registration can be found **here.**

	The Retirement Account Dashboard
Quotes - create, store and re-quote	✓
Enter Medical/lifestyle annuity information	✓
Set up regular/single contributions	✓
Set up ad-hoc crystallisation or ad-hoc income (new business)	✓
Apply online and track status	✓
PDF of online application	✓
Set up and manage Model Portfolios	✓
Policy information and valuation	✓
Bulk policy downloads	✓
Back office integration	✓
Access key policy documents online[1]	✓
Switch funds and manage investments[1]	✓
Rebalance – auto or ad-hoc[1]	✓
Manage regular income drawdown[2]	✓
Ad-hoc crystallisation or income (existing policies)[2]	✓
Access DFM portfolios[2]	✓

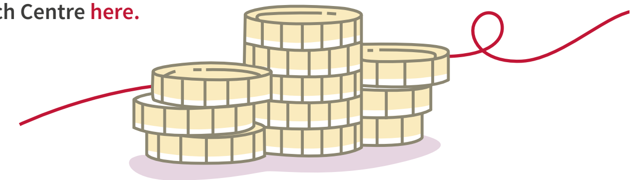
[1] Q2 2021 [2] Q3 2021

Fund Research Centre

We also have a **Fund Research Centre** where you can access detailed information about our range of Retirement Account funds. The user-friendly design allows you to compare funds and produce and save reports quickly with the minimum of fuss. You can:

+ Access fund factsheets and daily unit prices
+ Search and segment using a range of factors such as fund sector, asset class and cost
+ Evaluate past performance
+ Compare up to five investments using a variety of user-defined factors
+ Use the Morningstar X-ray tool to provide information on a multi-investment portfolio and assess how asset allocation is diversified by region, sector and style

Access the Fund Research Centre here.



[For advisers]

Adviser Connect

Through the Portal you can:

+ View onshore & offshore bond valuations online (excluding bonds with Discounted Gift Trust).
+ For offshore bonds, deal instructions can be submitted and transaction histories are available. Bulk downloads are available for valuations, transaction histories and adviser charge statements. Basic policy information and 5% allowances can also be viewed.

Going online makes it straightforward for advisers to report costs and charges and easier to comply with regulations, including the Insurance Distribution Directive (IDD).

	Adviser Connect (Offshore)	Adviser Connect (Onshore)
Current Valuations	✓[1]	✓[1]
Switch online	✓	
Back office integration	✓	✓
Bulk policy downloads	✓	
Transaction history for the last 18 months	✓	
Pending trades	✓	
Account holdings and assets	✓	✓
Information on 5% allowances	✓	✓
Account summary	✓	✓
Policies held within an account	✓	✓
Policy information / value	✓	✓
Total contributions	✓	✓
Withdrawals	✓	✓[2]

[1] Most recent valuations
[2] We offer some withdrawal information but limited in withdrawal type

Our online services are designed to give you the policy information you will need to see most frequently. For other requests, for example, to make withdrawals or switches, or to find out historical valuations, please call our Customer Services team.

Using the portal

Canada Life are continually improving the online user experience for advisers. You will now be able to manage client assets online across two systems within our portal - all using one single sign on.

1. **Adviser Connect (onshore and offshore bonds)**

2. **The Retirement Account Dashboard**

Advisers can register using either their email address or Unipass. In most cases, if you register with Unipass and use a back office system (such as intelligent office) then you will be able to view the Canada Life valuations through your back office system without having to log in through the Canada Life website.

We have introduced Unipass IDP to make it easy to access Adviser Connect and The Retirement Account dashboard online.

Roles and access

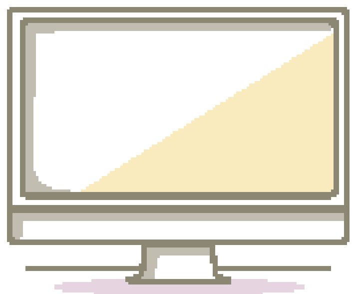
There are different roles/user types available when you register:

Role	Quotes	Client Access - Valuations	Commissions	Update User Access
Registered Individual (adviser or paraplanner)	✓	✓		
Commission Access			✓	
Local Administrator				✓
Central Administrator				✓

Access to The Retirement Account Dashboard will be available to all users after being set up as a Registered Individual. Users can register, log in, view, apply and submit quotes.

Administrators can provide additional access, including commissions/fees and policy documentation for Adviser Connect. More information on the different access levels is available in the Administrator Guide.

Instructions for registration can be found here.



System information

We recognise the need for seamless data transfer through Back Office Integration providers. The benefits of integrating your data feeds include:

+ Creating business efficiencies at a time when fees and charges are under increased pressure
+ Automating data flows helps reduce costs and allows data to be handled securely and safely, helping meet GDPR requirements.
+ Allows advisers to engage with a client base that has sophisticated digital requirements and expectations

We currently offer point to point back office integration services with the following providers for our products:

	Pension
	Core, Extended and Governed investment choice
	The Retirement Account
Creative Technologies (Enable)	✓
IRESS (The Exchange)	✓
Time4Advice	✓
Distribution Technology	✓
Fastrak	✓
True Potential	✓
Intelliflo	✓
1st Software	✓
2plan Wealth Management	✓
Best Practice	✓
Plum Software	✓
Bluecoat Software	✓
JCS	
Assyst Software	

	Investment Bonds	
	Internal fund range investment choice[1]	Full investment choice[2]
	Onshore CanInvest Select Account, Flexible Investment Bond, Total Access Bond & Select Investment Bond **Offshore** Offshore Savings Account, Delta Account	Premiere Account, Premiere Europe Account, Wealth Preservation Account, Wealth Preservation Europe Account, Controlled Access Account, Enhanced Estate Preservation Account, Estate Preservation Account, Inheritance Planning Account
Creative Technologies (Enable)	✓	✓
IRESS (The Exchange)	✓	✓
Time4Advice	✓	
Distribution Technology	✓	
Fastrak	✓	
True Potential	✓	
Intelliflo	✓	✓
1st Software	✓	
2plan Wealth Management	✓	
Best Practice	✓	
Plum Software	✓	✓
Bluecoat Software	✓	
JCS	✓	
Assyst Software	✓	

[1] Closed Architecture
[2] Open Architecture

[For customers]

MyAccess

With a MyAccess onshore account, UK drawdown customers can see their policy details* after they register online.

For our Fixed Term Income Plan, you get a regular, guaranteed income between 1 to 20 years. The term and income amount can be viewed online with MyAccess.

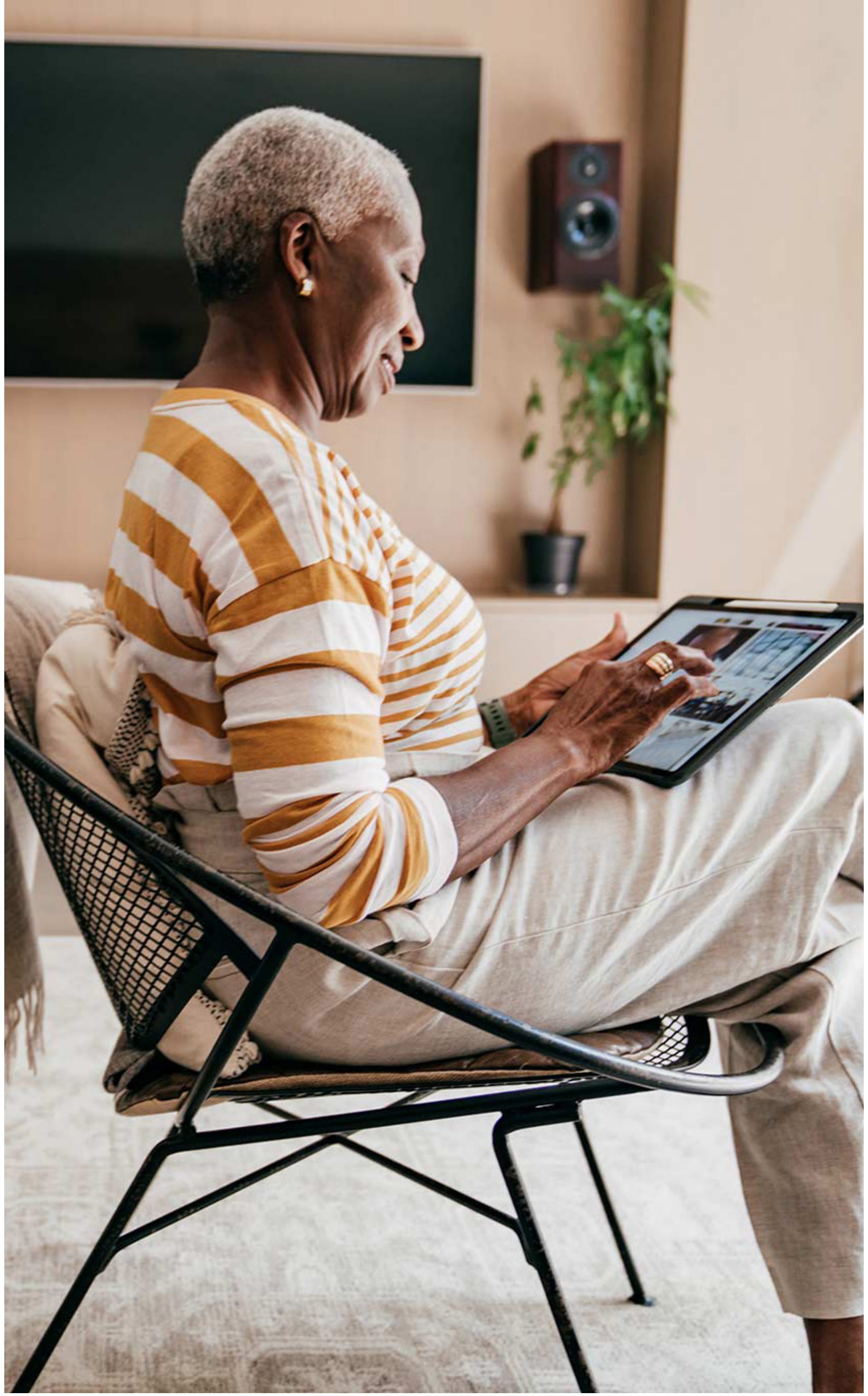
With a MyAccess offshore account, customers can see details of their offshore policies including current valuations. This includes the award winning Wealth Preservation Account and Premiere Account.

Customers can sign up or login to MyAccess here.

More information is available on our website with links to forms to request a withdrawal, change address etc. There are also links to the fund fact sheets – accessible from the policy valuation so clients can access the fact sheets related to the funds their policy is invested in.

*Policy details are also available for the Pension Investment Plan and Flexible Drawdown Plan.

	MyAccess
Current Valuations	✓
Client access	✓
Account summary	✓
Policies held within an account	✓
Policy information / value	✓
Total contributions	✓
Withdrawals	✓



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