



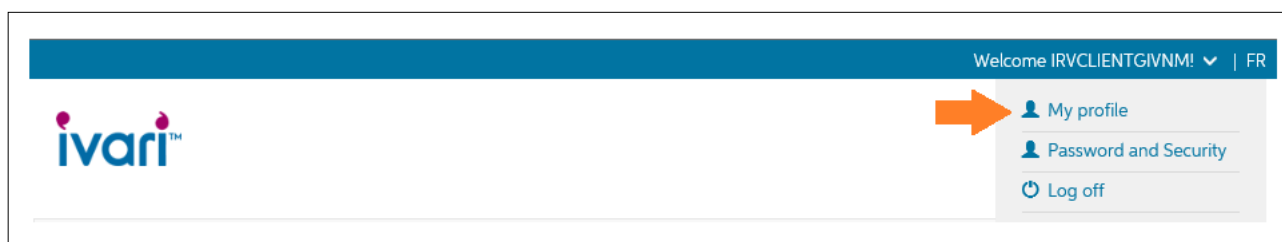
My ivari client portal – Key Features

A seamless experience

Clients can now choose to say goodbye to paper and receive ivari correspondence electronically through our online client portal. This convenient new feature will allow clients to receive updates faster so they can achieve peace-of-mind sooner.

Correspondence preference – Paperless vs paper

To set a correspondence preference, clients must log in to My *ivari*, click on the drop-down menu at the top right-hand side of the **Home page** and select **My profile**. Next, under the **Correspondence preference** section, they can click **EDIT**, choose their correspondence preference and then click **SAVE**.



Correspondence preference – Paperless vs paper

Welcome DIANE! | FR

My ivari

Home

My ivari profile

Full name: DIANE | Date of birth: | Industry: | Occupation: |

Personal information

For Canadian addresses only: To change an address outside of Canada, please contact your advisor or ivari Client Services at 1-800-846-5570.

Note: If your residential address (i.e. where you live or the physical location of the business) is different from your mailing address on file, only your residential address will be displayed in My ivari Notices and statements will continue to be sent to the mailing address on file.
For any inquires, or to make changes to your **mailing address**, please contact ivari.

Residential address: P.O. Box 4241, Station A
Toronto, ON M5W 5R3

Suite/Unit number: | Home phone: | Business phone: | Mobile: | Language: French

EDIT

Correspondence preference

You can choose to opt out of receiving correspondence from ivari by regular mail.
You will be notified, by email, whenever there is something new for you to review, for example billing notices and statements. Be sure to log into My ivari whenever you get an email notice from us as some correspondence may require your immediate attention.
Don't forget to add ivari.ca to your trusted/safe sender list so important emails from us don't end up as spam or in your junk folder.

Choose your correspondence preference: Paperless

EDIT

Note: If there is a bad mailing address on file, the **EDIT** button will be disabled. The client will be required to update their mailing address before they are able to select their correspondence preference.

Correspondence preference

You can choose to opt out of receiving correspondence from ivari by regular mail.
You will be notified, by email, whenever there is something new for you to review, for example billing notices and statements. Be sure to log into My ivari whenever you get an email notice from us as some correspondence may require your immediate attention.
Don't forget to add ivari.ca to your trusted/safe sender list so important emails from us don't end up as spam or in your junk folder.

Choose your correspondence preference: Select your preference now.

Your mailing address must be updated in order to edit your correspondence preference.

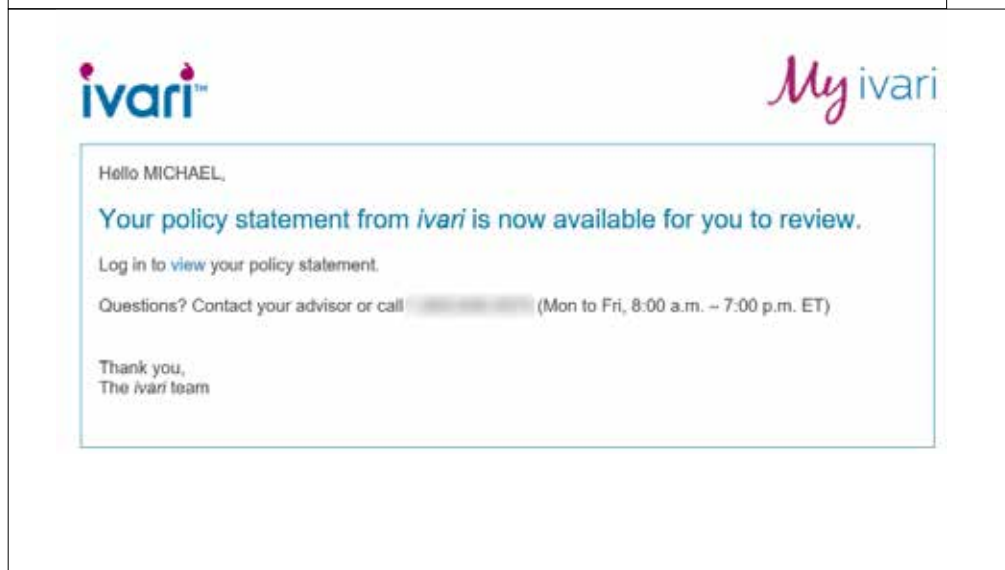
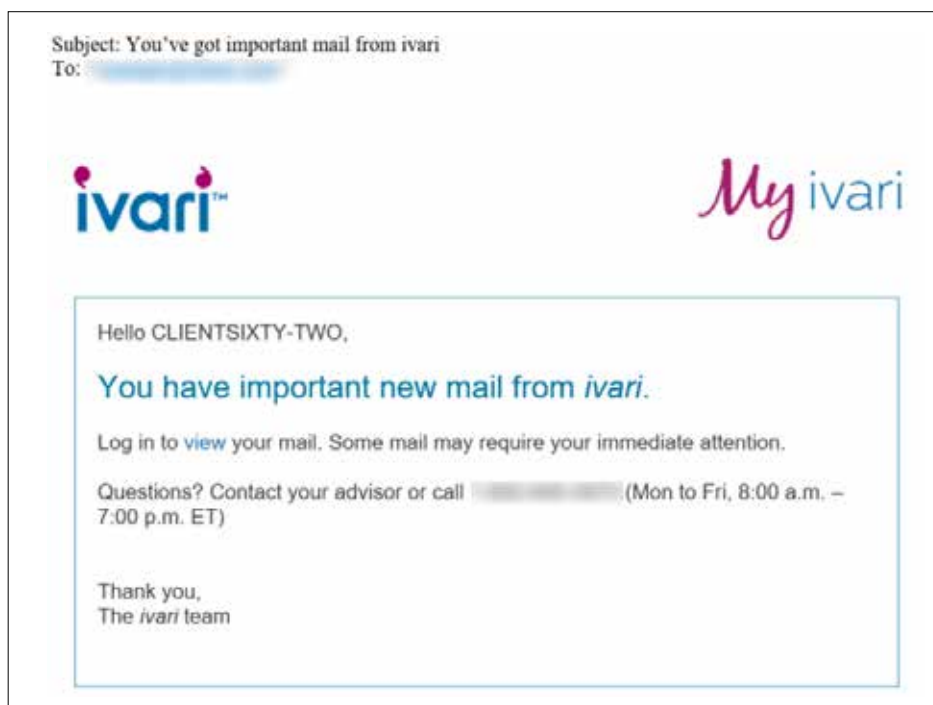
EDIT

Email notifications

If a client decides to go paperless, they will receive an email notification from ivari every time there is a new correspondence or policy statement for them to view. After clicking the link in the email, the client will be taken to My *ivari* log in page. Once logged in, they will be redirected to the correspondence or policy statement that requires their attention.

Important reminders:

- Clients should add ivari.ca to their trusted/safe sender email list to ensure these notifications don't get sent to their junk folder.
- All clients with a My *ivari* account will have access to their *ivari* correspondence online, however only those who have selected the "paperless" correspondence option will receive email notifications when a new correspondence or policy statement is ready for them to view.



Viewing ivari correspondence online

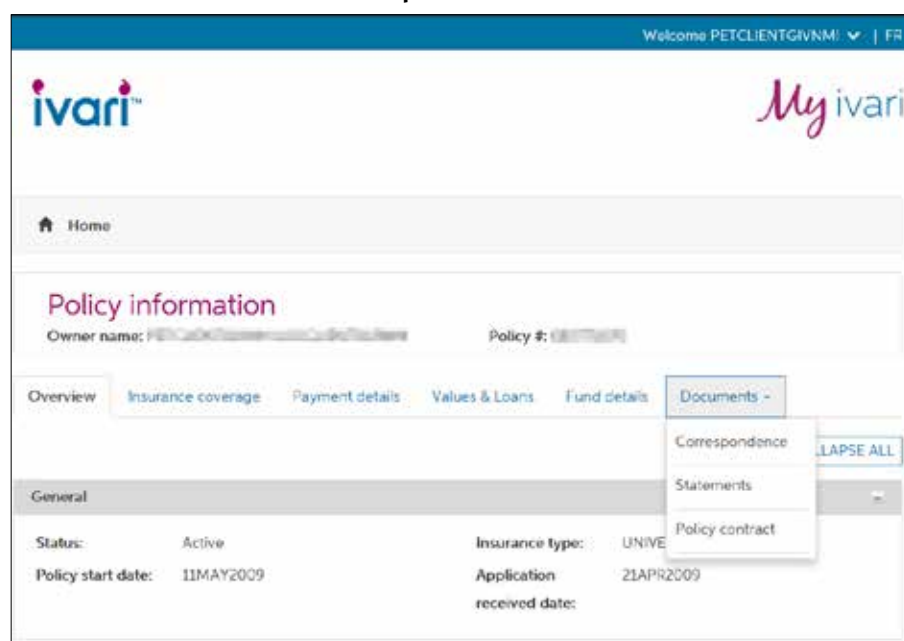
To access ivari correspondence online, clients must first log in to My *ivari*. From the **Home page**, they can click on their **policy number** to go to the **Policy information page**. There they will find all *ivari* correspondence under the new **Documents tab**.

The Documents tab contains the following document types:

- **Correspondence*** –inforce policy letters (including billing notices, if applicable)
- **Statements*** – policy statements for universal life policies only
- **Policy contracts** – contracts delivered on or after August 2020 will be displayed.

*Available online for a 24-month period.

Documents tab for Universal life policies



Welcome PETCLIENTGIVNMI | FR

ivari My *ivari*

Home

Policy information

Owner name: PETCLIENTGIVNMI Policy #: 123456789

Overview Insurance coverage Payment details Values & Loans Fund details Documents -

General

Status: Active Insurance type: UNIVE

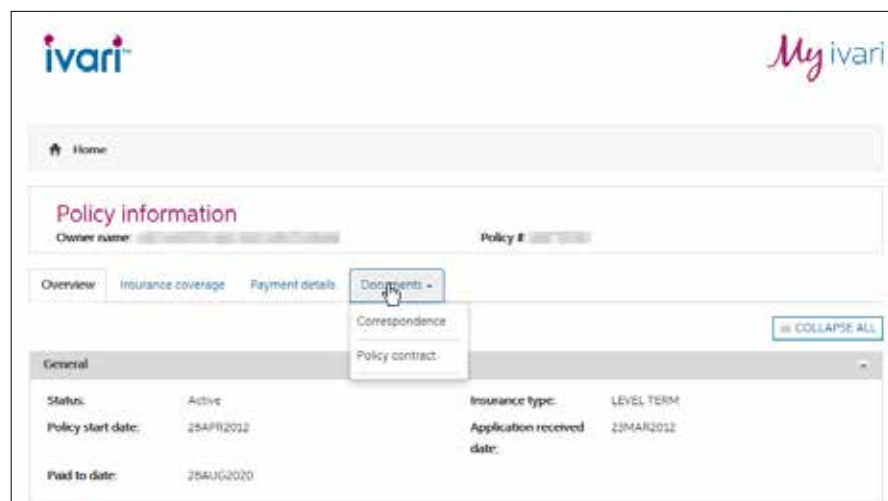
Policy start date: 11MAY2009 Application received date: 21APR2009

Correspondence LAPSE ALL

Statements

Policy contract

Documents tab for Term policies



ivari My *ivari*

Home

Policy information

Owner name: PETCLIENTGIVNMI Policy #: 123456789

Overview Insurance coverage Payment details Documents -

General

Status: Active Insurance type: LEVEL TERM

Policy start date: 25APR2012 Application received date: 23MAR2012

Paid to date: 25AUG2020



Correspondence COLLAPSE ALL

Policy contract

Documents → Correspondence

Clients can view the same inforce policy letters you see in webcappow right here in My ivari.

Welcome XXXXXXXXXX | FR

[Home](#)

Policy information



Owner name: XXXXXXXXXX Policy #: XXXXXXXXXX

[Overview](#)
[Insurance coverage](#)
[Payment details](#)
[Values & Loans](#)
[Fund details](#)
[Documents ▾](#)

Correspondence

[Hide filter](#)

Correspondence from ivari, will be kept online for your reference for 24 months. Looking for something that's older than 24 months? No problem, simply contact us.

From date: 06-05-2020  To date: 04-08-2020 

[GO](#)

Correspondence date	Insured name	View	Correspondence type description
29 JUN 2020	XXXXXXXXXX	VIEW	Term renewal/premium increase notification

Contact us


Mailing address

ivari
P.O. Box 4241, Station A
Toronto, ON M5W 5R3





Customer service:
conversation@ivari.ca

Toll free: XXXXXXXXXX

Mon - Fri 8:00 a.m. - 7:00 p.m. ET

[Send documents](#) 

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To view PDF files, you must have Adobe Acrobat Reader installed. [DOWNLOAD](#)

Please contact your advisor if you have any questions about *My ivari* or about your Ivari Insurance policy.



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Documents → Statements

Both quarterly and annual universal life policy statements are available for clients to view.

NEW! Clients will now have direct access to their quarterly policy statements!

[Home](#)

Policy information

Owner name: Policy #:

[Overview](#)
[Insurance coverage](#)
[Payment details](#)
[Values & Loans](#)
[Fund details](#)
[Documents +](#)

Policy statements

Your ivari statements will be kept online for your reference for 24 months. Looking for a statement that's older than 24 months? No problem, simply contact us.

Annual

From date	To date	Policy #	Insured name	Statement issue date	View PDF
11MAY2019	10MAY2020	<input type="text"/>	<input type="text"/>	12MAY2020	View
11MAY2018	10MAY2019	<input type="text"/>	<input type="text"/>	14MAY2019	View
28MAY2013	27MAY2014	<input type="text"/>	<input type="text"/>	29JUN2020	View


Quarterly

From date	To date	Policy #	Insured name	Statement issue date	View PDF
11NOV2019	10FEB2020	<input type="text"/>	<input type="text"/>	12FEB2020	View
11AUG2019	10NOV2019	<input type="text"/>	<input type="text"/>	12NOV2019	View
11MAY2019	10AUG2019	<input type="text"/>	<input type="text"/>	14AUG2019	View
11NOV2018	10FEB2019	<input type="text"/>	<input type="text"/>	12FEB2019	View
11AUG2018	10NOV2018	<input type="text"/>	<input type="text"/>	13NOV2018	View
11MAY2018	10AUG2018	<input type="text"/>	<input type="text"/>	15AUG2018	View
25APR2018	24JUL2018	<input type="text"/>	<input type="text"/>	29JUN2020	View





Contact us

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conversation@ivari.ca
Toll free:
Mon - Fri 8:00 a.m. - 7:00 p.m. ET
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Please contact your advisor if you have any questions about My ivari or about your ivari insurance policy.

Documents → Policy contract

All policy contracts delivered on or after August 2020 will be displayed.

[Home](#)

Policy information

Owner name: TERCLIENTGIVNM DAGCLIENTSURNM Policy #: 080T83534

[Overview](#) [Insurance coverage](#) [Payment details](#) [Values & Loans](#) [Fund details](#) [Documents ▾](#)

Policy contract

Policy contract version date	View
04JUN2020 21:52:47 PM	View

Go to the [Insurance coverage](#) page to get the most recent insurance coverage information.

Contact us

Mailing address





ivari
P.O. Box 4241, Station A
Toronto, ON M5W 5R3

Customer service:
conversation@ivari.ca

Toll free: [REDACTED]
Mon - Fri 8:00 a.m. - 7:00 p.m. ET

[Send documents](#) ⓘ

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Please contact your advisor if you have any questions about *My ivari* or about your ivari insurance policy.