



# My ivari (our client portal) - The inside edition

Clients with inforce policies issued on or after January 2, 1990 can now view their policy details and update their contact information online with My *ivari.*\*

\*Currently only available for life insurance policies.

#### **Access granted!**

For access to My *ivari*, inforce policy owners will need to register on <u>myivari.ca</u>. New business policies will be auto-registered at the time of application submission, and applicants will be given access once the policy is inforce.

Once registered, clients will receive a 'welcome email' with instructions on how to set up a password and activate their account.

#### A look inside

After logging in, clients will land on the **Home page**.

At the top right of this page, there is a drop-down menu with three options:

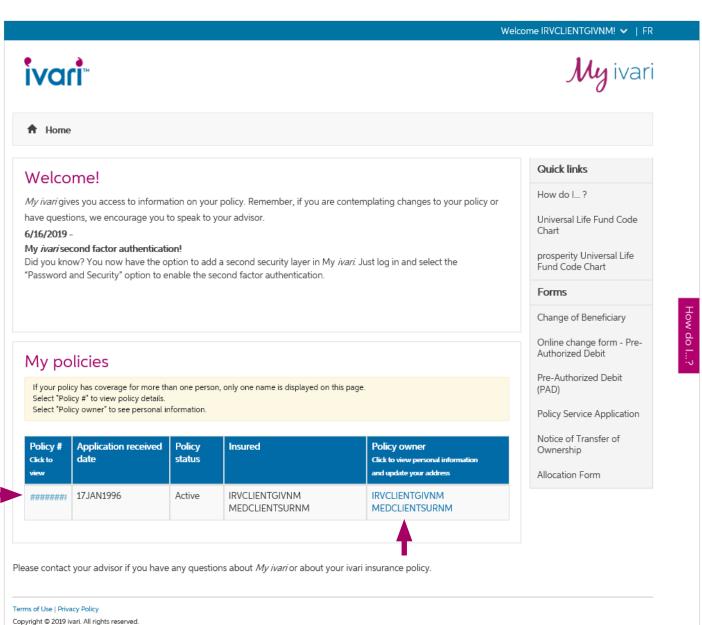
- My profile view personal information or update address
- Password and security make changes to passwords and set up second-factor authentication
- Log off sign out of My ivari



Clients will also see important messages, quick links, forms and all the policies they own.

- Click on **Policy #** to access policy information
- Click on **Policy owner** to view personal information or update address





2



## **Policy information**

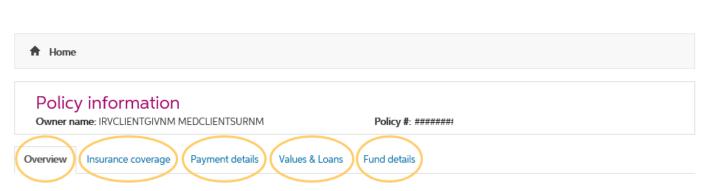
When clients select **Policy #**, the **Policy information** screen will appear. Here they will see the following tabs:

- Overview
- Insurance coverage
- Payment details
- Values & loans (visible for Universal Life policies only)
- Fund details (visible for Universal Life policies only)

Welcome IRVCLIENTGIVNM! ✔ | FR







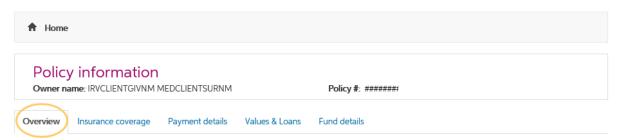


# **Policy information** → **Overview**

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COLLAPSE ALL

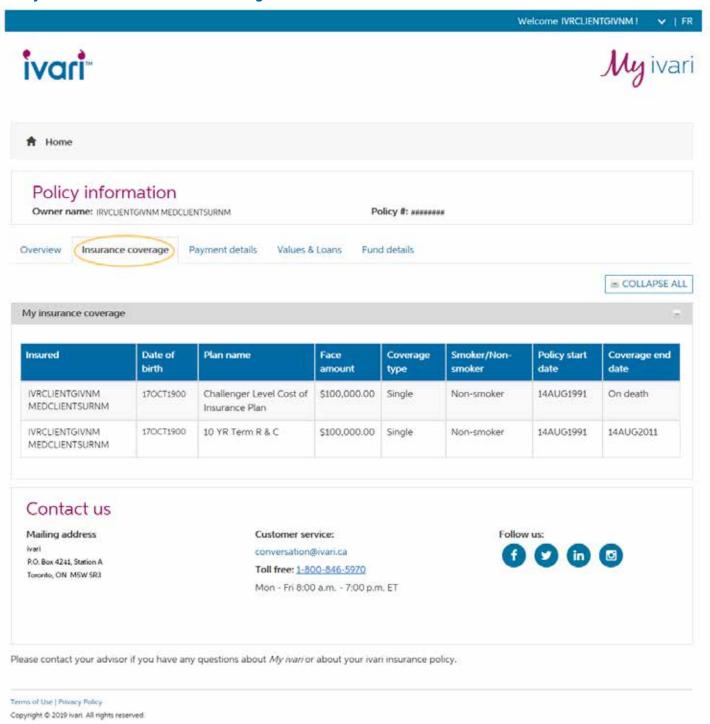
General				-
Status:	Active	Insurance type:	UNIVERSAL LIFE	
Policy start date:	18JAN1996	Application received	17JAN1996	
		date:		

lient relationships					
Relationship	Name	Date of birth	Sex	Beneficiary %	Beneficiary designation
OWNER	IRVCLIENTGIVNM MEDCLIENTSURNM	17OCT1900	MALE		
PRIMARY INSURED	IRVCLIENTGIVNM MEDCLIENTSURNM	17OCT1900	MALE		
PRIMARY BENEFICIARY	ESTATE •			100%	REVOCABLE

udvisor name 000 Yonge th Floor oronto PQ M2N 7J8 'A	LES LES ASSURANCES	Business phone	(416) 883-5000@	
Contact us Mailing address ivari P.O. Box 4241, Station A Toronto, ON MSW 5R3		Customer service: conversation@ivari.ca Toll free: 1-800-846-5970 Mon - Fri 8:00 a.m 7:00 p.m. ET	Follow us:	
ase contact your advisor	if you have any questions a	about My ivari or about your ivari insurance policy.		



# Policy information → Insurance coverage





#### Policy information → Payment details

Note: If the method of payment is 'direct billing', banking details will not be displayed.

Welcome IVRCLIENTGIVNM! ivari™ My ivari ♠ Home Policy information Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM Policy #: ####### Insurance coverage Payment details Values & Loans Fund details Overview COLLAPSE ALL Premium details Next payment date: 17NOV2019 9 Premium amount: \$104.58 Method of payment: Pre Authorized Debit Payment frequency: Monthly Banking details Payor name: IVRCLIENTGIVNM MEDCLIENTSURNM Bank #: 000 Bank name: BANK \*\*\*\*\*\*\*\*\*\*000 Transit: Account #: 00000 Pre authorized Withdrawal \$104.58 17 debit: date: Contact us Mailing address Customer service: ivari conversation@ivari.ca P.O. Box 4241, Station A Toll free: 1-800-846-5970 Toronto, ON M5W 5R3 Mon - Fri 8:00 a.m. - 7:00 p.m. ET Please contact your advisor if you have any questions about My ivari or about your ivari insurance policy.

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## For Universal Life policies only

If the client's policy is in shortage, the following message will appear on the **Payment details** screen:



# For Term policies only

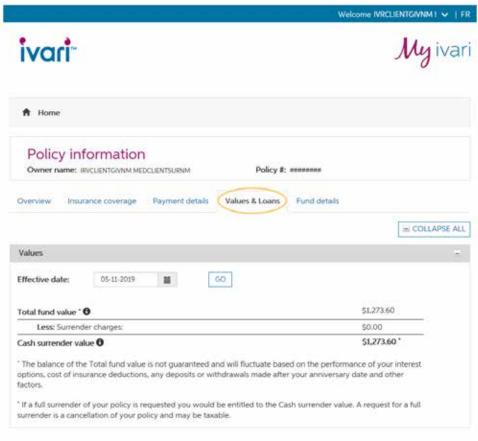
If the client has an outstanding premium, the following message on the **Payment details** screen:

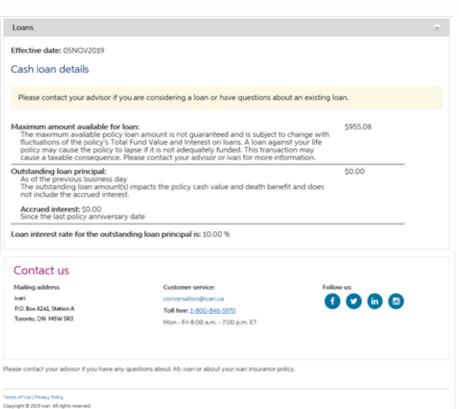




#### Policy information → Values & loans

Important! This tab is only visible to clients who have a Universal Life policy.







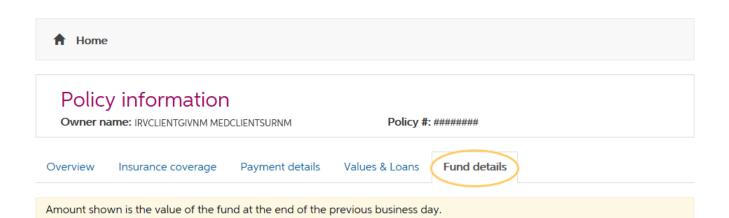
## Policy information → Fund details

Important! This tab is only visible to clients who have a Universal Life policy.

Welcome : IVRCLIENTGIVNM ! ✔ | FR



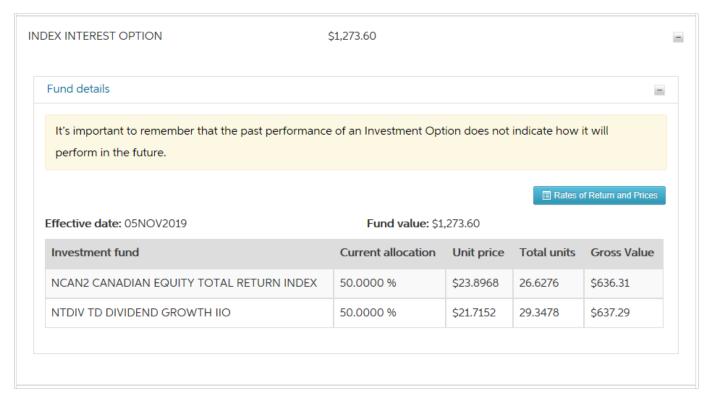




Interest option	Accumulated values	
TREASURY BILL INTEREST OPTION	\$0.00	+
5 YEAR FIXED RATE INTEREST OPTION	\$0.00	
INDEX INTEREST OPTION	\$1,273.60	$\rightarrow$
SIDE ACCOUNT	\$0.00	+



### Index Interest Option (previous image) expanded:



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