



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 myivari.ca. 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




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-  [My profile](#)
-  [Password and Security](#)
-  [Log off](#)

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 Home

Welcome!

My ivari gives you access to information on your policy. Remember, if you are contemplating changes to your policy or have questions, we encourage you to speak to your advisor.

6/16/2019 -
My ivari second factor authentication!
 Did you know? You now have the option to add a second security layer in *My ivari*. Just log in and select the "Password and Security" option to enable the second factor authentication.

My policies

If your policy has coverage for more than one person, only one name is displayed on this page.
 Select "Policy #" to view policy details.
 Select "Policy owner" to see personal information.

Policy # Click to view	Application received date	Policy status	Insured	Policy owner Click to view personal information and update your address
#####	17JAN1996	Active	IRVCLIENTGIVNM MEDCLIENTSURNM	IRVCLIENTGIVNM MEDCLIENTSURNM

Quick links

How do I... ?

Universal Life Fund Code Chart

prosperity Universal Life Fund Code Chart

Forms

Change of Beneficiary

Online change form - Pre-Authorized Debit

Pre-Authorized Debit (PAD)

Policy Service Application

Notice of Transfer of Ownership

Allocation Form

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

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How do I...?

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)

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My ivari

🏠 Home

Policy information

Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM

Policy #: #####

Overview

Insurance coverage

Payment details

Values & Loans

Fund details

Policy information → Overview

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My ivari

Home

Policy information

Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM

Policy #: #####

Overview

Insurance coverage

Payment details

Values & Loans

Fund details

COLLAPSE ALL

General

Status: Active

Insurance type: UNIVERSAL LIFE

Policy start date: 18JAN1996

Application received date: 17JAN1996

Client 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

Advisor contact information

Advisor name: LES LES ASSURANCES

Business phone: (416) 883-5000 ⓘ

5000 Yonge
5th Floor
Toronto PQ M2N 7J8
CA

Contact us

Mailing address

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

Customer service:

conversation@ivari.ca

Toll free: 1-800-846-5970 ⓘ

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

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Policy information → Insurance coverage

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My ivari

[Home](#)

Policy information

Owner name: IVRCLIENTGIVNM MEDCLIENTSURNM

Policy #: #####

[Overview](#)

[Insurance coverage](#)

[Payment details](#)

[Values & Loans](#)

[Fund details](#)

[COLLAPSE ALL](#)

My insurance coverage

Insured	Date of birth	Plan name	Face amount	Coverage type	Smoker/Non-smoker	Policy start date	Coverage end date
IVRCLIENTGIVNM MEDCLIENTSURNM	17OCT1900	Challenger Level Cost of Insurance Plan	\$100,000.00	Single	Non-smoker	14AUG1991	On death
IVRCLIENTGIVNM MEDCLIENTSURNM	17OCT1900	10 YR Term R & C	\$100,000.00	Single	Non-smoker	14AUG1991	14AUG2011

Contact us

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Policy information → Payment details

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

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My ivari

[Home](#)

Policy information

Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM

Policy #: #####

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[Fund details](#)

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Premium details

Next payment date: 17NOV2019

Premium amount: \$104.58

Method of payment: Pre Authorized Debit

Payment frequency: Monthly

Banking details

Payor name: IRVCLIENTGIVNM MEDCLIENTSURNM

Bank #: 000

Bank name: BANK

Transit: 00000

Account #: *****000

Pre authorized debit: \$104.58

Withdrawal date: 17

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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:

Outstanding premium

Your policy is in danger of lapsing. Please contact your advisor or *ivari* at [1-800-846-5970](tel:1-800-846-5970), or refer to the letter that was sent to you recently.

For Term policies only

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

Outstanding premium



Your premium payment is overdue. Please contact your advisor or *ivari* at [1-800-846-5970](tel:1-800-846-5970) to avoid your policy lapsing.

Paid to date	Premium required
25MAY2016	\$17.28

Policy information → Values & loans

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

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Home

Policy information

Owner name: IVRCLIENTGIVNM MEDCLIENTSURNM Policy #: *****

Overview Insurance coverage Payment details **Values & Loans** Fund details

COLLAPSE ALL

Values

Effective date: 05-11-2019

Total fund value * ①	\$1,273.60
Less: Surrender charges:	\$0.00
Cash surrender value ①	\$1,273.60 *

* The balance of the Total fund value is not guaranteed and will fluctuate based on the performance of your interest options, cost of insurance deductions, any deposits or withdrawals made after your anniversary date and other factors.

* If a full surrender of your policy is requested you would be entitled to the Cash surrender value. A request for a full surrender is a cancellation of your policy and may be taxable.

Loans

Effective date: 05NOV2019

Cash loan details

Please contact your advisor if you are considering a loan or have questions about an existing loan.





Maximum amount available for loan:	\$955.08
The maximum available policy loan amount is not guaranteed and is subject to change with fluctuations of the policy's Total Fund Value and interest on loans. A loan against your life policy may cause the policy to lapse if it is not adequately funded. This transaction may cause a taxable consequence. Please contact your advisor or ivari for more information.	
Outstanding loan principal:	\$0.00
As of the previous business day The outstanding loan amount(s) impacts the policy cash value and death benefit and does not include the accrued interest.	
Accrued interest: \$0.00	
Since the last policy anniversary date	

Loan interest rate for the outstanding loan principal is: 10.00 %

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Policy information → Fund details

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Policy information

Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM

Policy #: #####

[Overview](#)






[Insurance coverage](#)

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[Fund details](#)

Amount shown is the value of the fund at the end of the previous business day.

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

Index Interest Option (previous image) expanded:

INDEX INTEREST OPTION
\$1,273.60

Fund details

It's important to remember that the past performance of an Investment Option does not indicate how it will perform in the future.

[Rates of Return and Prices](#)

Effective date: 05NOV2019
Fund value: \$1,273.60

Investment fund	Current allocation	Unit price	Total units	Gross Value
NCAN2 CANADIAN EQUITY TOTAL RETURN INDEX	50.0000 %	\$23.8968	26.6276	\$636.31
NTDIV TD DIVIDEND GROWTH IIO	50.0000 %	\$21.7152	29.3478	\$637.29