# ivari



# 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**.



# ivari

# **Correspondence preference – Paperless vs paper**

vari			My iva
A Home			
<i>My ivari</i> pro	ofile		
Full name Industry:	DIANE	Date of birth: Occupation:	100117001
Personal inf	formation		
For Canadian addresse	n only. To change an address outside of (	Canada, planse contact your advoce or AvartD	ient Services at 1 800 846-5970 <sub>6</sub> 8
will be displayed in Aly	il address (i.e. where you live or the physic v wart Notices and statements will continue	ical location of the business) is different from your to be sent to the mailing address on file.	our making address on the, only your residential address
will be displayed in Alj For any inquires, or to Residential address:	Address (i.e. where you live or the physic ware Notices and statements will control mole changes to your mailing address, p P.O. Box 4241, Station A Toronto, ON M5W 5R3	ical location of the business) is different from y ue to be sent to the making address on file. please contact warf	our meansy address on the, only your rejudential address
will be displayed in Aly For any inquirer, or to Residential address: Suite/Unit number: Home phone: Business phone:	Address (i.e. where you live or the physic ware Notices and statements will control mole changes to your mailing address, p P.O. Box 4241, Station A Toronito, ON MSW 5R3	ical location of the business) is different from y up to be sent to the making address on Sie. please contact war	our meansy address on the, only your reparential address
Aute i you recenu wil be duplayed in My For any inquire, or to Residential address: Suite/Unit number: Home phone: Business phone: Mobile: Language:	Inddress (i.e. where you live or the physic ware Notices and statements will control mole changes to your mailing address, p P.O. Box 4241, Station A Toronto, ON M5W 5R3 French	ical location of the business) is different from y ue to be sent to the maining address on the please contact viset	our meansy address on the, only your residential address
Velle in your resonant will be deplayed in My For any imparet, or for Residential address: Suite/Unit number: Home phone: Basiness phone: Mobile: Language: Correspond rou can choose to op rou will be notified, b van whenever you ge Don't forget to add ivo	And these file where you live or the physic ware Notices and statements will conten- mole changes to your mailing address, p P.O. Box 4241, Station A Toronto, ON M5W 5R3 Prench Prench Interpretation of the physical statement out of receiving correspondence fir y email, wherever there is somethin et an email notice from us as some co an i.e.a to your trusted/safe sender list	ical location of the trusteena) is different from y ue to be sent to the maining address on the please contact visit form warrby regular mail. In new for you to review, for example bit orrespondence may require your immed it so important emails from us don't end u	EDIT fing notices and statements. Be sure to log into My late attention. ap as spam or in your junk folder

**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 <i>ivari</i> by regular mail.	
You will be notified, by email, whenever there is something new for you to review, for example billing notices and statements. B <i>ivari</i> whenever you get an email notice from us as some correspondence may require your immediate attention.	e sure to log into My
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 fold	el Your mailing address must be
Choose your correspondence preference: Select your preference now.	updated in order to edit your correspondence preference.



# **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.

vari	My iva
Hello CLIENTSIXTY-TWO,	
You have important new r	nail from ivari.
Log in to view your mail. Some mail ma	ay require your immediate attention.
Questions? Contact your advisor or ca 7:00 p.m. ET)	(Mon to Fri, 8:00 a.m. –
Thank you, The <i>ivari</i> team	
vari	My i
Hello MICHAEL,	
Your policy statement from ivan	i is now available for you to review.
Log in to view your policy statement.	
Ouestions? Contact your advisor or call	(Mon to Fri, 8:00 a.m. ~ 7:00 p.m. ET)
70 <sup>1</sup>	



# 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

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A Home					
Policy	y information		Policy #;		
Overview	Insurance coverage	Payment details	Values & Loans Fund details	Documents -	
				Correspondence	LAPSE ALL
General				Statements	
Status:	Active		Insurance type: UNIVE	Policy contract	
Policy start	t date: 11MAY2009		Application 21APR received date:	2009	

Documents tab for Term policies

ivari				My ivari
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Policy information		Poky I		
Overview Insurance coverage Payment details	Decygents -			
	Policy contract			= COLLAPSE ALL
General				
Seneral Status: Active Policy start date: 254/P12012		Insurance type: Application received date	LEVEL TERM 23MAR2012	



### $\textbf{Documents} \rightarrow \textbf{Correspondence}$

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

			Welcome	
ivari				My ivar
ft Home				
Policy informatio	n	Policy #:	070000	
Overview Insurance coverage	Payment details Valu	es & Loans Fund details	Documents +	
Correspondence				Hide filter
Correspondence from ivari, will simply contact us.	be kept online for your referen	nce for 24 months. Looking fo	r something that's older than 24 m	onths? No problem,
From date: 06-05	2020	To date:	04-08-2020	GO
Correspondence date	Insured name	View Corresp	ondence type description	
29JUN2020	NG OCT STORAGED	VIEW Term re	newal/premium increase notificati	2n :
Contact us				
Mailing address ivari P.O. Box 4241, Station A Toronto, ON M5W 5R3	Custome conversa Toll free: Mon - Fri Send doo	r service: tion@ivari.ca : 1 8:00 a.m 7:00 p.m. ET cuments	Follow us:	6
To view PDF files, you must have Adi Please contact your advisor if you ha	obe Acrobat Reader installed. ve any questions about <i>My Iv</i>	DOWNLOAD an'or about your lvari insurance	e policy.	
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#### $\textbf{Documents} \rightarrow \textbf{Statements}$

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!

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A Home					
Policy int	formation		Policy #		
erview Insu	rance coverage	Payment detail	Values & Loans Fund details Docur	menuts -	
olicy statements					
Your ivari statem contact us.	vents will be kept o	online for your re	ference for 24 months. Looking for a statement t	vat's older than 24 months? No	problem, simply
Annual					
From date	To date:	Policy #	Insured name	Statement issue date	View PDF
11MAY2019	10MAY2020	100.79074	attractions intractions	12MAY2020	View
11MAY2018	10MAY2019	-	an error of the real	14MAY2019	View
28MAY2013	27MAY2014		denter de la constante de la const	29JUN2020	View
Quarterly From date	To date.	Policy #	troured name	Statement issue date	View PDF
11NOV2019	10FE82020	-	With the Common Contraction States	12FEB2020	View
11AUG2019	10NOV2019	-	and a final second second second	12NOV2019	View
11MAY2019	10AUG2019	10000001	Introduction contractioned	14AUG2019	View
11NOV2018	10FE82019	1000000	and a financial and a final set	12FE82019	View
11AUG2018	101407/2018	-	The second second second	13NOV2018	View
11MAY2018	10AUG2018	(and the state)	And an inclusion with second second	15AUG2018	View
25APR2018	24JUL2018	-	Periodic server concederation	29JUN2020	View
Contact U Mailing address Vari	IS		Customer service: conversation@vari.ca	Follow us:	0
P.O. Box 4243 Foronto, ON	I, Station A M5W 5R3		Toll free Mon = Fri 5:00 a.m. = 7:00 p.m. ET Send documents		•
iau 2016 Flar un	u must have Adob	e Acrobat Reader	DOWNLOAD		



### $\mathsf{Documents} \to \mathsf{Policy}\ \mathsf{contract}$

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

ivari					My ivari
A Home					
Policy information	LIENTSURNM	Policy #: 08	30783534		
Overview Insurance coverage Pay	ment 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	Customer service:			Follow us:	
ivari	conversation@ivari.ca				
P.O. Box 4241, Station A Toronto, ON M5W 5R3	Toll free:	10.0000			
	Mon - Fri 8:00 a.m 7:0 Send documents	0 p.m. ET			
To view PDF files, you must have Adobe Acro Please contact your advisor if you have any c	bat Reader installed. DOWNLOAD	] r ivari insuranc	e policy.		

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