



## 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](https://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 #<br>Click to view | Application received date | Policy status | Insured                          | Policy owner<br>Click to view personal information and update your address |
|---------------------------|---------------------------|---------------|----------------------------------|--|
| #####                     | 17JAN1996                 | Active        | IRVCLIENTGIVNM<br>MEDCLIENTSURNM | IRVCLIENTGIVNM<br>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

How do I... ?

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

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## 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  
5000 Yonge  
5th Floor  
Toronto PQ M2N 7J8  
CA

Business phone: (416) 883-5000 ⓘ

### Contact us

#### Mailing address

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

#### Customer service:

[conversation@ivari.ca](mailto:conversation@ivari.ca)

Toll free: 1-866-934-8332 ⓘ

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

#### Follow us:



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

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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         |

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#### Follow us:



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

## 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 #: #####

[Overview](#)

[Insurance coverage](#)

[Payment details](#)

[Values & Loans](#)

[Fund details](#)

[COLLAPSE ALL](#)

#### 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 [1-866-934-8332](tel:1-866-934-8332), 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 [1-866-934-8332](tel:1-866-934-8332) to avoid your policy lapsing.

| Paid to date | Premium required |
|--------------|------------------|
| 25MAY2016    | \$17.28          |





## Policy information → Fund details

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

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My ivari

 Home

### Policy information

Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM

Policy #: #####

[Overview](#)

[Insurance coverage](#)

[Payment details](#)

[Values & Loans](#)

[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    |