



# 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:

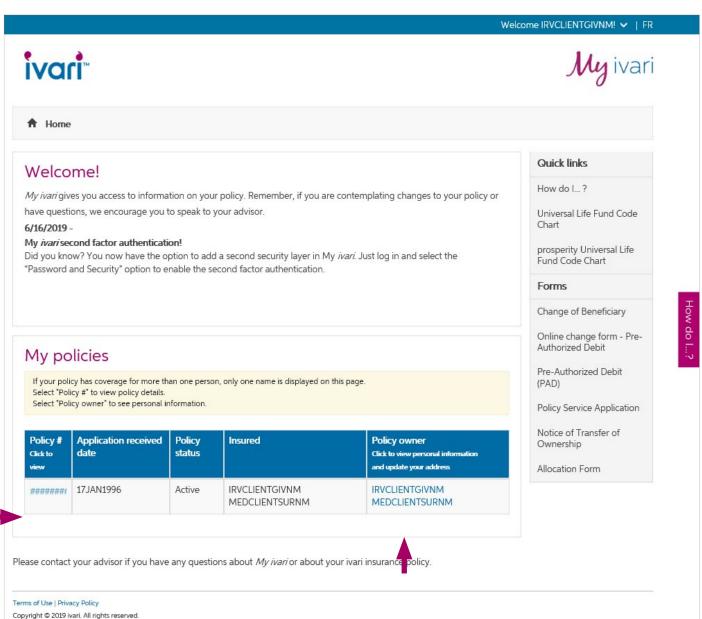
- My profile view personal information or update address
- Password and security make changes to passwords and set up second-factor authentication
- Log off sign out of My ivari



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







#### **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! 

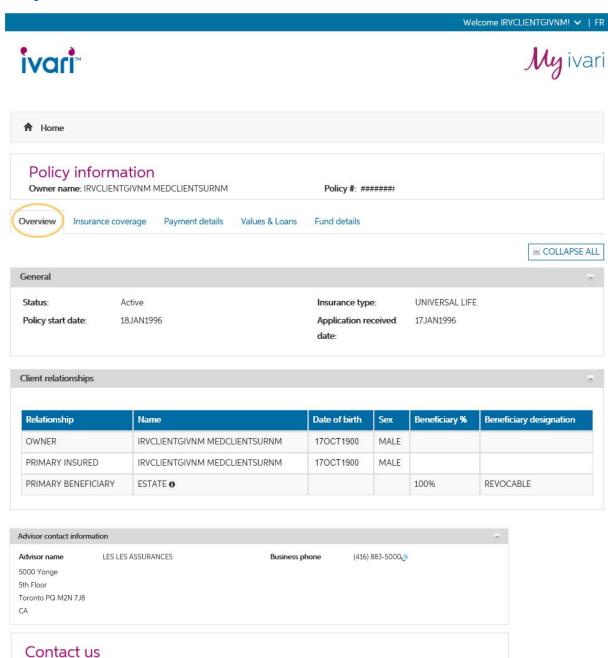
↑ Home

Policy information
Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM
Policy #: ########

Overview Insurance coverage Payment details Values & Loans Fund details



#### Policy information → Overview



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

Customer service:

conversation@ivari.ca

Toll free: 1-866-934-8332

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

Terms of Use | Privacy Policy

Mailing address

P.O. Box 4241, Station A

Toronto, ON M5W 5R3

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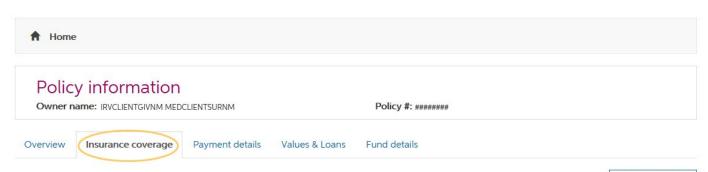
#### Policy information → Insurance coverage

Welcome IVRCLIENTGIVNM! ✓ | FR









COLLAPSE ALL

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

Mailing address

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

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Follow us:







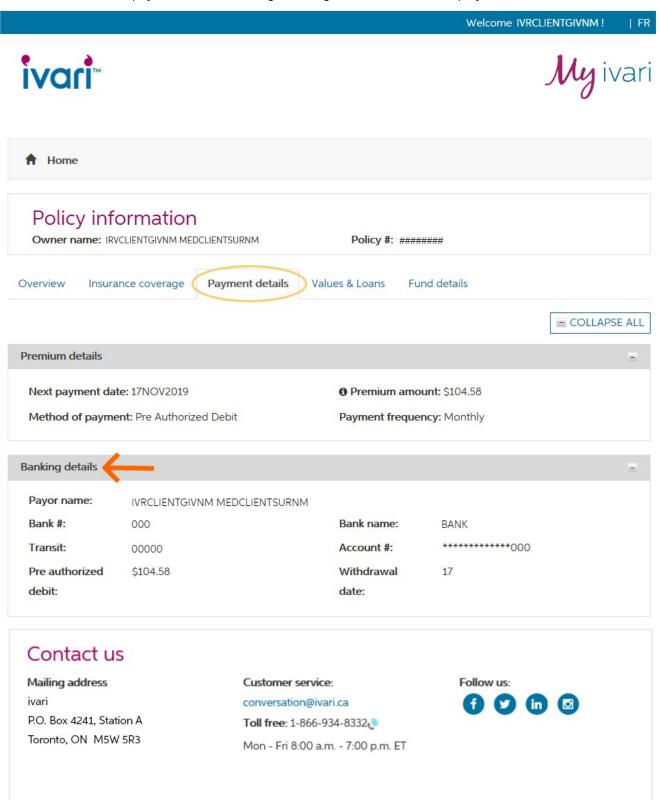


Please contact your advisor if you have any questions about My ivari or about your ivari insurance policy.



#### Policy information → Payment details

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



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



#### 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

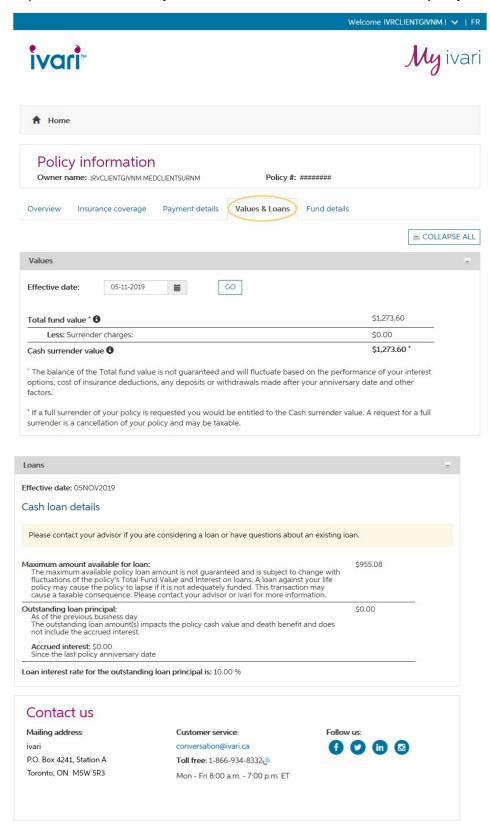
If the client has an outstanding premium, the following message on the **Payment details** screen:





#### Policy information → Values & loans

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



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



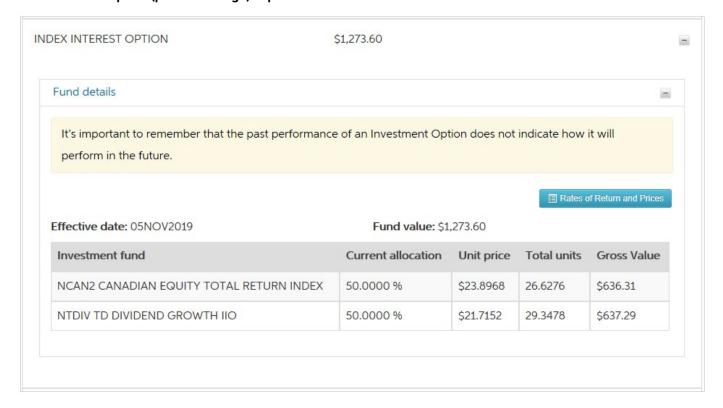
#### Policy information → Fund details

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

Welcome IVRCLIENTGIVNM! ✔ | FR ivari™ My ivari **↑** Home Policy information Owner name: IRVCLIENTGIVNM MEDCLIENTSURNM Policy #: ####### Fund details Overview Insurance coverage Payment details Values & Loans 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:



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