



GLOBAL PACIFIC  
FINANCIAL SERVICES LTD.

## Doing business with Canada Life

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We're here for you and your clients. With new tools, events and updates to our business processes, we're making it easier for you to do business with us



### **CE credit opportunity!**

On March 11 at 1 p.m. ET, we'll be welcoming Carolyn Ho, Consultant, Business Transitions from Canada Life to kick off the first of four sessions as part of our Transition and succession planning series: fundamentals of an emergency transition plan.

[Register now](#)

### **See the track record of success behind Risk-Managed Portfolios**

Irish Life Investment Managers (ILIM) have managed funds similar to our Risk-Managed Portfolios for more than seven years and currently manage around \$28 billion in multi-asset strategies. This piece highlights how one of ILIM's multi-asset portfolios protected clients from significant drawdowns, including the market crash brought on by COVID-19. You can order additional marketing and support materials for Risk-Managed Portfolios. Check out the [advisor brochure \(70-0558\)](#), [client brochure \(70-0555\)](#) and [managed solutions array \(70-0557B\)](#), which are available in the Risk-Managed Portfolios toolkit.

### **Privacy considerations for employees and third-party services**

Hiring new employees or bringing in third-party services can introduce privacy risks to your workplace. Follow our suggested safeguards when starting or ending a business relationship to minimize risk. Ensure you continue to minimize risks with your current employees or third-party services.

### **Change to doctor letter process**

After a decision is made to rate or decline a client based on their lab results, your client won't receive a letter advising them we're sending the results to their doctor. You'll receive an email with our decision, including: Why we're rating or declining your client and if we're writing to your client's doctor. As always, your clients can access the lab results from their insurance application by using their unique barcode from myLabWorks. If your client would still like us to write their doctor with their lab results, please reach out to your New Business Associate.

### **Your resource for conducting business digitally**

We've moved to a much more virtual and digital way of connecting with clients and conducting business, as a result of COVID-19. This is your source for everything you need to continue to conduct business in a virtual environment while also giving you updates to processes as our communities continue to reopen. Resources include news such as paramedical process updates, digital business guides, tips on connecting with clients virtually and recordings of every *This week with Canada Life* call.

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