

Inforce Service and Administration Update

Submitted by Dan Thorburn on February 1, 2013 - 1:53am

Change: Investment Confirmations for Monthly PAC Deposits

Client Statements - Investment Accounts

Reminder: Insurance Company Website Registration

Change: Investment Confirmations for Monthly PAC Deposits

The advisor copy of the insurance company's Monthly PAC Deposit Investment Confirmation will no longer be distributed nor stored in VirtGate. The client receives their copy directly from the insurance company. Units, values and trades are updated electronically daily and displayed in VirtGate for quick access. In the event you require balances on a client account that is not reported in VirtGate, it will be necessary to login to the carrier's website to see transactions and market values.

Note: If you have investment accounts you would like reported and valued on VirtGate, a request to consolidate your business, please speak with Geoffrey or Tony to coordinate.

Client Statements - Investment Accounts

Annually, each January and July, Financial Institutions distribute semi-annual investment client statements. The statements are either printed or made available on their website. Global Pacific will distribute the paper copy of the client statements; however, since many carriers only provide the statements on their website, we recommend you login to retrieve.

Refer to the manufacturer's distribution methods regarding Client Investment Statements:

Manufacturer	Website View	Paper
Canada Life		Yes
Empire Life		Yes
Equitable Life	Yes	
Industrial Alliance	Yes	
Manulife Financial	Yes	
RBC Insurance		Yes
Standard Life		Yes

Reminder: Insurance Company Website Registration

As a reminder, insurance companies deliver client status notices and commission statements to you from their websites. In order to access your documents from the insurance company, you will login with your User Login and secure Password. If you haven't already done so, we highly recommend you register on each company's website.

Below, click on the URL link for insurance company websites. Look for **Registration** or **new user** and click. You may be asked to complete particulars including:

1) MGA's name ? insert **Global Pacific Financial Services**

2) Broker Code ? insert your **Agent Code**

Manufacturer	Website URL
BMO Insurance	https://advisorsupport.bmoinsurance.com/english/auth/login/login.asp
Canada Life	https://repnet1.canadalife.com/selfcare/iiipRepNetLoginSelfCareWar/
Canada Protection Plan	http://www.cpp.ca/advisors
Desjardins Financial	https://www.webi.dsf-dfs.com/Webi/ExcludedPath/Login.aspx?ReturnURL=http%3a%2f%2fwww.webi.dsf-dfs.com%2fwebi%2fTemplatesPrive%2ftelechargement.aspx%3fNRMODE%3dPublished%26NRNODEGUI0AF5-4BF3-A9B4-7F44F3E65B6E%257d%26NRORIGINALURL%3d%252fen-CA%252f_Utilitaires%252fTlchrgmnt%252f%26NRCACHEHINT%3dGuest
Empire Life	https://web5.empire.ca/eidc/signin.jsp
Equitable Life	http://www.equitable.ca/advisorhome/index.asp
Foresters Life	http://www.foresters.com/CA-EN/Advisors/Pages/Advisor-Login.aspx
Industrial Alliance	https://iapa.secureweb.inalco.com
Manulife Financial	https://hermes.manulife.com/canada/wmHomePagesPub.nsf/Public/pubhomepage
RBC Insurance	http://www.rbcinsurance.com/businessintelligencecentre
Standard Life	https://viproom.standardlife.ca/pin/Login.jsp

Note: Refer to the Website URL Quick Reference sheet, to utilize for storing your User ID and Passwords.

Tip: When saving Passwords electronically, consider renaming it something other than *Passwords* for enhanced security measures.

Attachment

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Type

Inforce Service and Administration Update

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