



GLOBAL PACIFIC
FINANCIAL SERVICES LTD.

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Submitted by Victoria on December 10, 2020 - 4:21pm



Thank you for doing business with Canada Life. Here's the latest issue of the eBulletin from Canada Life with information to help you in your business with us. Please forward to your advisors where appropriate.

Effective at the end of December access to RepNet requires log in - how to be ready?

- As of Jan. 1, 2021, all business websites and web content available to the public must be compliant with the Accessibility for Ontarians with Disabilities Act (AODA)
- Effective at the end of December, you'll be required to log in to see content intended only for you. This strategy is consistent with the future of our new advisor sites that will offer you a better user experience
- Public-facing sites, such as www.canadalife.com, are AODA compliant and will still be accessible without a log in

GIO policy numbers now available online

- You can now view Canada Life guaranteed interest option (GIO) policy numbers in Investment inquiry on RepNet to make it easier to do and keep track of GIO business
- GIOs are a safer investment with guaranteed returns and may be a great fit for clients looking for more security during this uncertain time
- Access all GIO resources through the [Retirement solutions toolkit](#)

Insurance Operations Update

- Troubleshooting WebApp issues
- FATCA/CRS tax status self-certification mandatory effective January 2021
- Term policy cancellation process changes
- Form Update: Surrender request

Wealth Operations Update

- Client letters - Canada Life logo to print in black and white
- FATCA/CRS ? Tax Status Self-Certification Mandatory Effective January 2021
- Maturity instructions are due in December for registered savings policies
- Application and form updates
- Delay for January income payments
- Estimated Mailing dates for investment tax receipts and slips
- Administrative guides - Reminder

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