

Online Carrier Correspondence and Statements Reference Chart

Time Sensitive Correspondence and Policy Statements

PPI is committed to protecting your and your client’s privacy, and to ensuring the confidentiality of personal information provided to us in the course of our business. We recognize that life insurance policy statements and time-sensitive correspondence, such as notices regarding NSF, lapses, overdue or unpaid premiums, and options to reinstate must be brought to your attention quickly.

There is no better way to deliver notices, securely and in a timely manner, than directly from the carrier, through their online portal. For notices where carriers do not yet provide all your correspondence online, PPI will provide you copies of time sensitive correspondence via Bluesun Advisor and email you to let you know when it’s been added.

The chart below indicates which carriers offer their correspondence/policy statements online, through their secure portals. For carriers who do not yet provide all your correspondence/policy statements online, PPI will continue to provide you with copies, if received.

NOTE: You will need to ensure you are **registered** on the various carrier websites and have your login credentials to view policy statements and other correspondence.

For assistance regarding your inforce business and related correspondence, please contact your local **PPI office**.

Carrier	Annual Policy Statements	Time Sensitive / Inforce Correspondence	Investment Correspondence
<u>Assumption Life</u>	Available online	Available online (If not available Assumption will email it)	
<u>Beneva</u>	Available online		Available online
<u>BMO Insurance</u>	Available online		
<u>Canada Life</u>			
<u>CPP</u>			
<u>Desjardins Financial</u>	Available online	Available online	
<u>Empire Life</u>	Available online (Except for Optimax and Estatemax)		Available online
<u>Equitable Life</u>	Available online	Available online	Available online
<u>Foresters Financial</u>	Available online	Available online	
<u>Humania Assurance</u>			
<u>iA Financial Group</u>	Available online (for Genesis products)	Available online	Available online
<u>ivari</u>	Available online	Available online	Available online

	Available online		
<u>Manulife</u>	<ul style="list-style-type: none"> • Perspecta annual statements (via the Standard Life portal through the Manulife website) • Some annual policy statements are available on the advisor portal under your secure inbox 	Available online	Available online (On demand)
<u>RBC Insurance</u>			
<u>SLi</u>			
<u>Sun Life Financial</u>	Available online	Available online	
<u>UV Insurance</u>	Available online		