



GLOBAL PACIFIC
FINANCIAL SERVICES LTD.

Doing business with Canada Life

Submitted by Victoria on February 11, 2021 - 11:17am



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



Save the date: Transition and succession planning series ? part 1

On **March 11 at 1 p.m. ET** we'll be launching our new series! Join us for the first session on **Fundamentals of an emergency transition plan**. Expanding on the succession planning session we held in November, whether you want to sell your book of business or you're looking forward to growing it, it's important to be ready for any transition. Hear from keynote speaker Carolyn Ho, Consultant, Business Transitions on how to plan to protect your

growing business against the unexpected, while setting yourself up for future growth. This CE accredited session will be simultaneously translated in French with Mandarin to follow on-demand. Keep an eye out for registration on Feb. 16. Please contact [Rita Prest](#) with any questions.

Streamlining the digital application process

Single start helps to make new digital applications with Canada Life? a seamless experience by guiding you to the digital application best suited to your clients? needs ? SimpleProtect? or the New Business WebApp.

Join us for a live demonstration of SimpleProtect with information on [single start](#) and a chance to ask questions

Date: Thursday, Feb. 18

Time: 1 to 2 p.m. EST

Save the date

January 2021 market update: how Biden?s presidency, vaccine rollouts and central bank announcements could shape a recovery

Insights into current events and their impacts on markets, from Canada Life Investment Management Ltd. (CLIML). Read the full commentary for CLIML?s detailed view and share it on LinkedIn, Twitter or email.

New Chinese marketing materials to help with your client conversations

Use these new marketing materials available in traditional and simplified Chinese, to help support your client conversations around RRSP planning and current market conditions:

Risk-managed portfolios client brochure (form 70-0555 CH & 70-0555 CHS)

Risk-managed portfolios advisor brochure (form 70-0558 CH & 70-0558 CHS)

RESP brochure (form 70-0536 CH & 70-0536 CHS)

Mutual fund client brochure (form 70-0425 CH & 70-0425 CHS)

In addition, a new **Estate planning client guide** (form 46-7780 CH) is also available. This guide explains in detail the what, why, when and how of estate planning. It can help your clients and their families to be more confident about their future

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, frequently asked questions, tips on connecting with clients virtually and recordings of every *This week with Canada Life* call.

Canada Life community-focused brand campaign update

Canada Life Week to Save Lives makes an impact across the country. 16,670 donor appointments were booked during the Week to Save Lives and helped Canadian Blood Services and Hema-Quebec exceed their weekly blood collections targets! You can #BeAHero from home and join Canada Life in supporting Canadian Blood Service's Stem Cell Registry. As a result of Covid-19, recruitment of stem cell donors has dropped by 70% and donors from diverse backgrounds are especially needed. Learn more about the program and help to spread the word. Although Hockey Helps the Homeless can't take to the ice this year, the Canada Life Cup virtual fundraising campaign ensures that teams still have the ability to fundraise in support of local organizations dedicated to supporting homeless and at-risk Canadians. The need this year is greater than ever, and the cause is #BiggerThanTheGame



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