



GLOBAL PACIFIC  
FINANCIAL SERVICES LTD.

## Doing business with Canada Life

Submitted by Victoria on February 25, 2021 - 11:01am



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\*\*](#)

## RRSP season: this year's contribution deadline is March 1

2020 was unpredictable. Help make sure your client's financial future isn't. A December forecast from economic research firm Capital Economics showed that Canadian households were set to save **\$200 billion more in 2020** than in 2019. Investing some of these savings through an RRSP or TFSA account can help get your clients' money working for them today so they can save for tomorrow. Check out our marketing toolkit for new materials to help your client conversations this RRSP season, including enhanced concepts and information on our new Risk-Managed Portfolios.

## Protecting client information while working from home

When working from home, make sure you're protecting your clients' privacy. Set up your home office to minimize privacy risks by following our suggested safeguards. Follow best practices when interacting digitally with your clients, including using encryption and passwords. Remember: privacy breaches can have serious consequences for you and your clients.

## 12 business across Canada receive \$10,000 grant from Canada Life

The 12 recipients for the Canada Life Business Boost program have been announced! The new initiative, which received nearly 4,000 applications, awards small businesses across the country with a one-time grant of \$10,000. Help us spread the word - please share our social media posts to promote the great work these businesses are doing in our communities.

## Insurance Operations Update

- Form updates

## 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.



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