

Now complete select investment applications online

Save time and process business faster – Canada Life investments applications can now be filled out electronically.

Always be ready for a sale. The following applications for segregated funds are available on Canada Life RepNet™ under Forms & procedures > Investments:

- Canada Life segregated funds – Income, 46-5714
- Canada Life segregated funds – Savings, 46-7135
- Canada Life segregated funds – TFSA, 46-7305
- Canada Life segregated funds – Estate Protection, 46-7168

It's simple to use

- You'll require Adobe Reader 9 or above to access and use the forms.
- Make sure you always access the applications online to ensure you're using the most current version.
- Use the links in the electronic application if you need to reference related material on *RepNet*.
- Type the information into applicable fields and print the document for clients to sign.
- Mandatory fields will not be marked, so you're still responsible for ensuring all necessary fields are filled before submitting.
- Please ensure you make two photocopies of the signed application:
 - One for the client
 - One for your records
- Send the original signed application to head office.
- Use the Clear button to clear data entered and start entering another client's data.

Hard copy applications

There are no changes to business processes or procedures. Hard copies can still be used and ordered from supply.

If you have any suggestions or issues using the fill-able applications, email [Wealth Management Learning Development](#).