

# How to register, get access and enroll



# Self-registration email

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Welcome to Canada Life! You now need to finish setting up your savings plan by registering for My Canada Life at Work. It's where you'll manage the savings you have through your work, set financial goals and more.

After you register, check that your contact info, beneficiaries and investment choices, if applicable, are all up to date.

[Register now](#)

This unique link expires in 90 days. Please do not forward.

If the link doesn't work, copy and paste this link into your browser:

<https://www.canadalife.com>

Need help registering? Call us weekdays from 8 a.m. to 8 p.m. ET at 1-888-222-0775.

Have you already registered for My Canada Life at Work? No need to do anything. [Sign in](#) anytime.

THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY.

Canada Life Group Services


canada  life

# Step 1 – Account Registration

## Account registration

Step 2 of 6: Add personal details


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### Personal information

**First name**  
  
As stated on your job record

**Last name**  
  
As stated on your job record



### Sign-in details

**Personal email address**  
myemail@gmail.com  
As stated on your job record. You'll use it to log in.

**Password**

**Confirm password**

Password must include at least:

- 1 lowercase letter
- 1 uppercase letter
- 1 number
- 8 characters
- 1 of these special characters: !@#\$%^&\*~`-+=<>

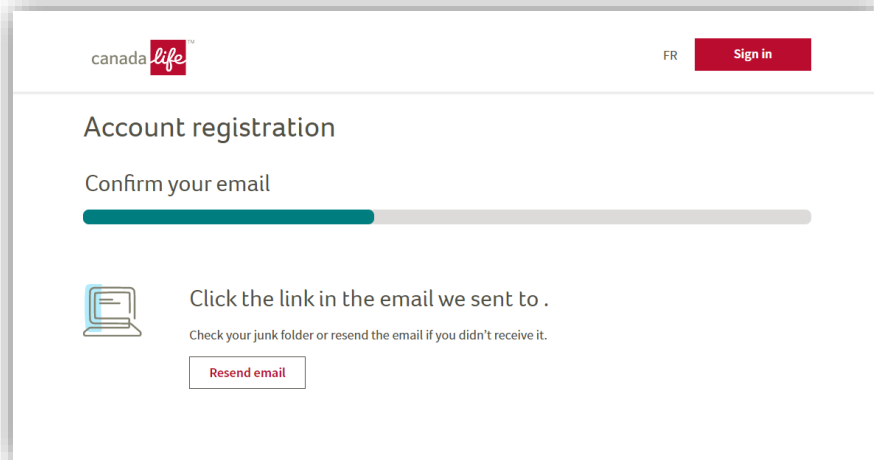
KEEP EXISTING INPUT BOXES AS APPLICABLE AS THEY ARE IN CURRENT REGISTRATION FLOW for eg Site language, T&C etc...

Lorem ipsum

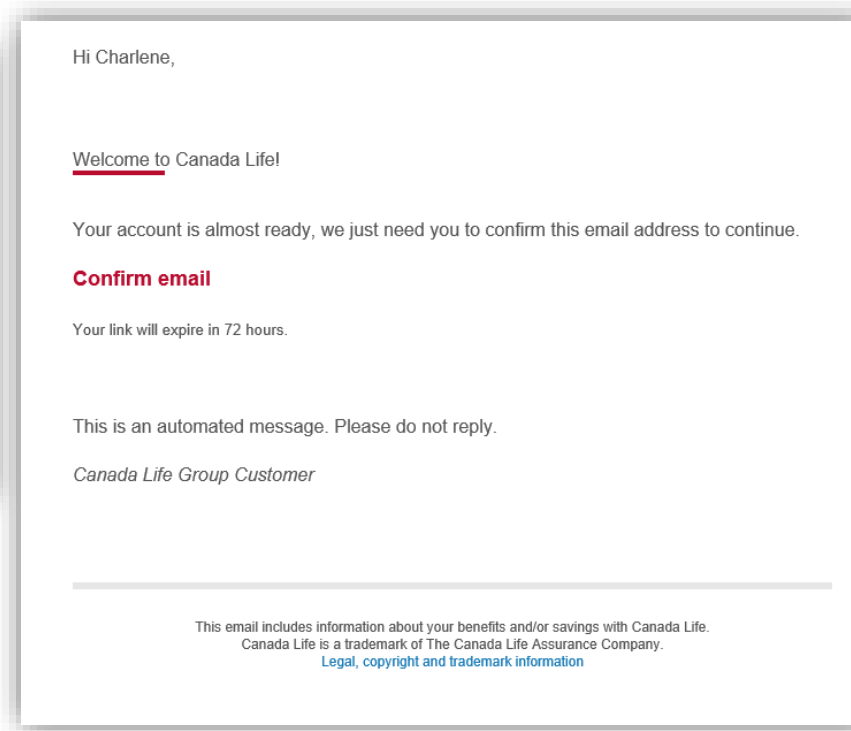
Lorem ipsum

# Step 2: Confirm your email address

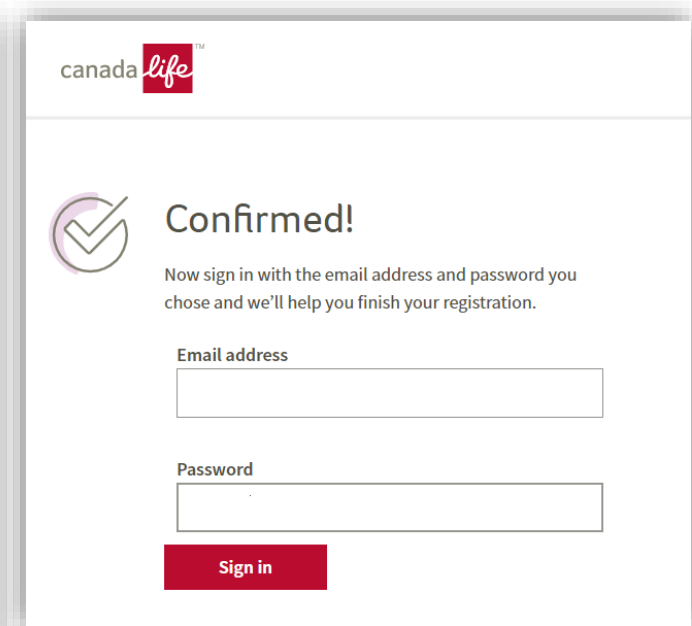
## Go your email inbox



## Click the link to confirm



## Re-enter your email address and password



# Step 3 – Account Linking

## Setting up your account

Step 3 of 6: Let's make sure it's you



### Verifying your identity

We need a few details to confirm that it's you before we move on.

Date of birth

<input type="text" value="Please select"/>	<input type="text"/>	<input type="text"/>
Month	Day	Year

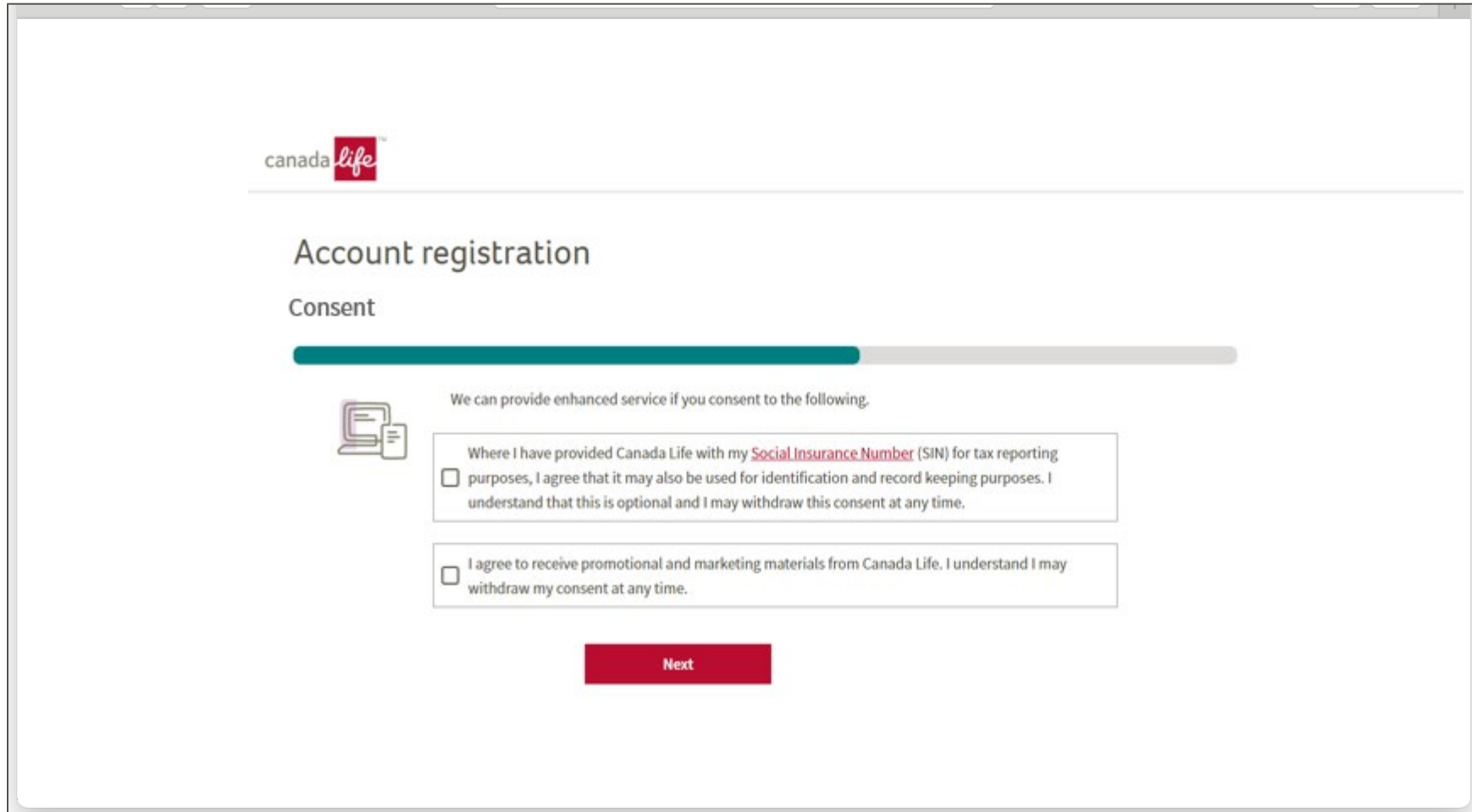
First name

Middle name

Last name

Postal code

# Step 4: Provide consent



The screenshot shows a web page for Canada Life account registration. At the top left is the Canada Life logo. Below it, the heading "Account registration" is displayed, followed by the sub-heading "Consent". A progress bar is shown with a teal segment on the left and a grey segment on the right. To the left of the consent text is an icon of a laptop and a document. The consent text reads: "We can provide enhanced service if you consent to the following." Below this are two checkboxes, each with a text box containing the consent statement. The first checkbox is for consent to use the Social Insurance Number (SIN) for identification and record keeping. The second checkbox is for consent to receive promotional and marketing materials. At the bottom center is a red "Next" button.

canada life

## Account registration

### Consent

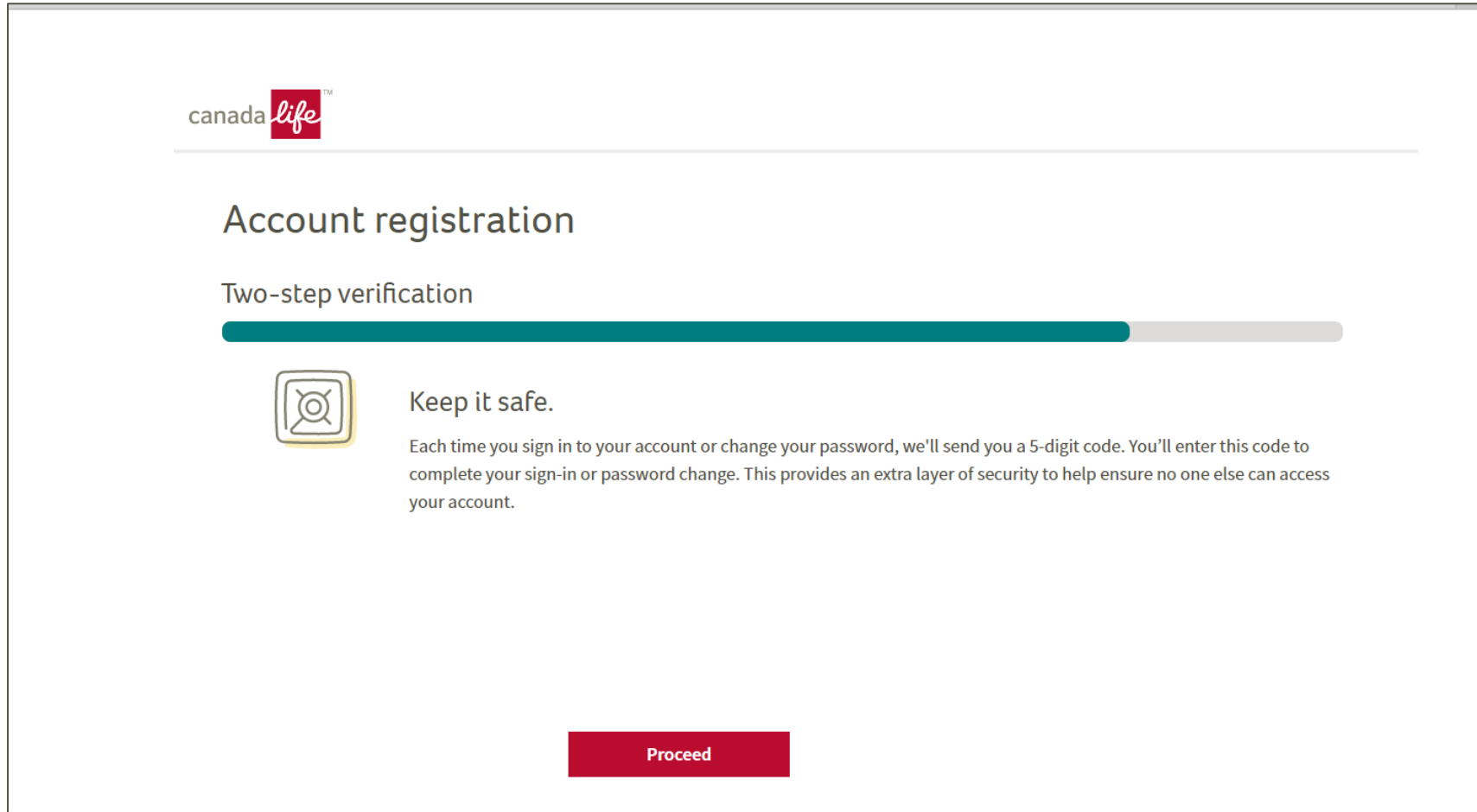
We can provide enhanced service if you consent to the following.

Where I have provided Canada Life with my **Social Insurance Number (SIN)** for tax reporting purposes, I agree that it may also be used for identification and record keeping purposes. I understand that this is optional and I may withdraw this consent at any time.

I agree to receive promotional and marketing materials from Canada Life. I understand I may withdraw my consent at any time.

Next

# Step 5: Set up two-step verification




The screenshot shows the 'Account registration' page for Canada Life. At the top left is the 'canada life' logo. Below it, the page title 'Account registration' is displayed. Underneath, the section 'Two-step verification' is shown with a progress bar that is approximately 75% complete. To the left of the text is an icon of a smartphone with a checkmark. The text reads: 'Keep it safe. Each time you sign in to your account or change your password, we'll send you a 5-digit code. You'll enter this code to complete your sign-in or password change. This provides an extra layer of security to help ensure no one else can access your account.' At the bottom center, there is a red button labeled 'Proceed'.

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## Account registration

### Two-step verification

 **Keep it safe.**

Each time you sign in to your account or change your password, we'll send you a 5-digit code. You'll enter this code to complete your sign-in or password change. This provides an extra layer of security to help ensure no one else can access your account.

**Proceed**

# Done!

The screenshot shows the Canada Life account overview page. On the left is a navigation sidebar with the Canada Life logo at the top, followed by menu items: Overview (highlighted in red), Contributions, Savings (+), Info centre, Resources (+), and Options for you. Below the menu is another Canada Life logo. The main content area is titled "Overview" and features a greeting: "Good afternoon, Bert Demo!". Below the greeting is a note: "The last sign-in to your account was on Monday, October 17, 2022 at 3:00 p.m. EDT." A red button with a plus icon and the text "Contribute more" is positioned below the note. Underneath is a "Savings overview" section with a piggy bank icon. This section includes a "Summary" table with four categories: Total balance, Growth, Your contributions, and Sponsor contributions. At the bottom of the overview are two boxes for "Savings and income plans": "REGISTERED PENSION PLAN" (RPP) and "REGISTERED RETIREMENT SAVINGS PLAN" (RRSP), each with a "Balance" label.

canada *life*

**Overview**

Contributions

Savings +

Info centre

Resources +

Options for you

canada *life*

## Overview

Good afternoon, Bert Demo!

The last sign-in to your account was on Monday, October 17, 2022 at 3:00 p.m. EDT.

[+ Contribute more](#)

Savings overview

### Summary

Total balance	Growth
Your contributions	Sponsor contributions

### Savings and income plans

<b>REGISTERED PENSION PLAN</b>	<b>REGISTERED RETIREMENT SAVINGS PLAN</b>
RPP	RRSP
Balance	Balance



# Next Steps

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Complete your pension plan and registered retirement savings enrolment:

- Beneficiary
- Payroll deduction amount
- Your Investments

# Complete beneficiary designations

canada life

Good evening, Jordan!


Messages JS

[Back to profile](#)

## Beneficiaries and dependants

Your savings

Beneficiaries [View](#)

 **Beneficiaries and dependants**  
Add, change or remove your beneficiaries and dependants.



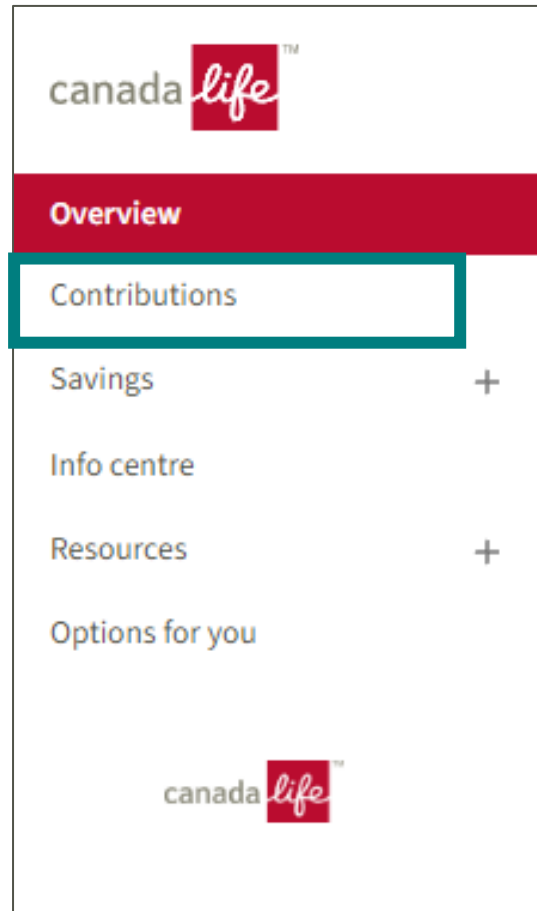
Click Initials icon on Overview page



Review and edit

# Complete Payroll deductions

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Click Contributions on the left side menu

# Complete your payroll contributions

The screenshot displays the Canada Life web portal interface. On the left, a navigation menu includes 'Overview' (highlighted), 'Contributions', 'Savings', 'Info centre', 'Resources', and 'Options for you'. The main content area is divided into two columns. The left column shows an 'Overview' section with a greeting 'Good afternoon, Bert Demo!', a 'Contribute more' button, and a 'Savings overview' section with a 'Summary' table. The right column shows a 'Contributions' section for a 'Registered retirement savings plan' (RRSP), indicating that a 'Member required' and providing a message 'You're saving this much.' with an input field for the 'Amount'. At the bottom right, there are 'Cancel' and 'Save' buttons.

**Overview**

Good afternoon, Bert Demo!

The last sign-in to your account was on Monday, October 17, 2022 at 1:02 p.m. EDT.

[Contribute more](#)

**Savings overview**

Summary	
Total balance	Growth
\$	\$
Your contributions	Spousal contributions
\$	\$

Includes contributions up to November 01, 2020.

**Savings and income plans**

REGISTERED PENSION PLAN	REGISTERED RETIREMENT SAVINGS PLAN
RPP	RRSP
Balance	Balance
\$	\$

**Contributions**

Registered retirement savings plan

RRSP

Member required

You're saving this much.

Amount

Cancel [Save](#)

# Complete your Investment instructions



## View your portfolio

Detailed info about your investments

[Plan overview](#)

View your plans and beneficiaries

[Activity reports](#)

Get reports by plan and date range

[Duplicate tax receipts](#)

Get copies of your tax receipts



## Change your portfolio

Where to go to make changes to your investments

[Investment instructions](#)

View and update instructions for future contributions and transfers

[to fund transfer](#)

Move money between funds

[Cash withdrawal](#)

Withdraw money from your plans

[Maturing investments](#)

Find out when investments reach their maturity date

[Automatic investment rebalancing](#)

Specify preferences and frequency

[Enrolment express](#)

Sign up for additional plans

[Printable forms](#)

Download forms for requests and changes



## Investments

Get info on the investments offered in your group plans

[Fund reviews](#)

View rates of return

[Fund reports](#)

Fund composition and investment manager info

[Net unit value and rates](#)

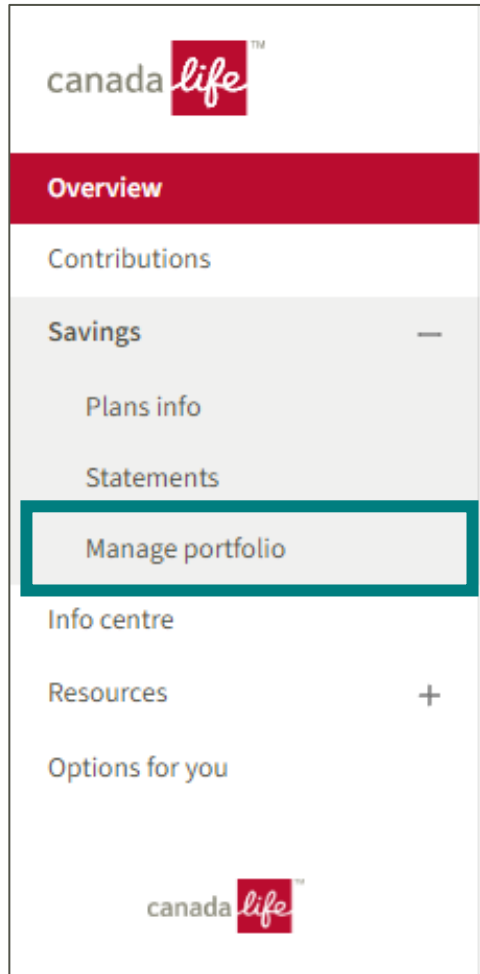
Fund values and rates for guaranteed investments

[Investment management fee and expense](#)

Get details for each fund

Want to join other plans?  
Non-registered Saving Plan (NRSP)  
Tax-free Savings Account (TFSA)

# Join other plans



Click Savings on the left-hand menu  
Click Manage portfolio

# Join other plans

## Tools and resources

All links open in a new tab



### Upload documents

Upload forms and files here one at a time. Your files will be encrypted to protect your information. Be sure to keep your original documents in case we need them.

[Choose document](#)

Max file size: 10 MB

> Accepted file formats



### View your portfolio

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[Enrolment express](#)

Sign up for additional plans



# Get started

**Enrolment express** canada **life**™

Français | Contact us | Close

## Get started on your future today.

Your group retirement or savings plan will help you save for your retirement, with access to tips and tools along the way.

[Get started →](#)

### Your retirement or savings plan enrolment

Enrolling in your plan is an easy but important step towards having a successful savings or retirement goal. Do this for yourself – because your participation and choices make a difference.

The Access ID and password you create will give you online access to your account.

#### Attention Québec residents

#### This notice is part of your member booklet

In addition to the information in your member booklet that's provided by your plan administrator, here are some extra notes about your plan.

#### Death benefit

When you enrol and become a member – and if your plan allows – you can choose who'll receive the value of your plan when you die. This is called designating a beneficiary. The monetary amount your beneficiary receives is called the **death benefit**. The death benefit is paid within 30 days after Canada Life receives all supporting documents requested (e.g. proof of death, etc.). This timeframe could be shorter depending on your policy.

### About your group plan

**life** The power of a gro... ⋮

[▶](#)

To enrol click on Get started

# Choose your plan

**Plan types** Tips & tools ▾

Select the plan you're enrolling in. You may not be eligible for all plan(s). If you're unsure, contact your plan sponsor.

Plan name	Status
NON REGISTERED SAVINGS PLAN	<a href="#">Enrol now</a> →
TAX FREE SAVINGS PLAN	<a href="#">Enrol now</a> →

## Select a plan to enrol

- Only options that are available to you will be available
- You must go through the enrolment process for each plan type you want to join

# Choose your payroll deductions

The screenshot shows the 'Enrolment express' interface for 'canada life'. The navigation bar includes 'test case', 'Contact us', 'Delete', and 'Sign out'. The main navigation tabs are 'Plan types', 'More information', 'Contributions' (highlighted), 'Investments', 'Beneficiaries', and 'Submit'. A 'Tips & tools' dropdown is visible.

## Contributions

### TAX-FREE SAVINGS PLAN

Depending on your plan, contributions may come from different sources, for example, your employer, or you the member. Also, some plans require members to make contributions, while other plans treat member contributions as voluntary. Please read the descriptions of each contribution type.

[See what a contribution could be worth at retirement.](#)

Contribution type	Amount	Description
MEMBER VOLUNTARY	\$ _____	\$ per pay period. You may choose to make contributions of any amount, subject to CRA maximums.

Navigation buttons: [← Back](#) and [Continue →](#)

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Privacy policy | Legal | Internet security | Accessibility

# Choose your investments

Plan types > More information > Contributions > **Investments** > Beneficiaries > Submit

## Investments

TIPS & TOOLS

### TAX-FREE SAVINGS PLAN

Select your investments by choosing an option below.

Option 1	Option 2	Option 3
<b>Express option</b> A hands-off approach to investing. Simply choose a fund based on your desired retirement date. This investment is called a target date fund. <a href="#">More information</a> The fund recommended below is based on the retirement age of 69. <b>Recommended</b> * BLACKROCK LIFE PATH 2055 <a href="#">Fund report (PDF)</a> <input type="radio"/> Change your retirement year BLACKROCK LIFE PAT... <a href="#">Fund report (PDF)</a> <b>Select &amp; continue</b>	<b>You know what kind of investor you are</b> If you know what kind of investor you are, select an investor type below. An investment will be recommended based on your investor type. Select investor type <a href="#">Compare investor types</a> <b>Select &amp; continue</b>	<b>Find out what kind of investor you are</b> Complete the <i>Investment Personality Questionnaire</i> to find your investor type. An investment will be recommended based on your investor type. <b>Continue</b>

Contributions directed to variable investments are not guaranteed and will increase or decrease in value.

**Back**

**Option 1** – select a target date\* fund

**Option 2** – choose your investor type to select a target risk\* fund

**Option 3** – complete the Investment Personality Questionnaire to help you build your own portfolio

# Choose your beneficiaries

The screenshot shows a navigation bar with five steps: Plan types, Contributions, Investments, Beneficiaries (highlighted in green), and Submit. Below the navigation bar, the heading 'Beneficiaries' is displayed in blue, with a 'Tips & tools' dropdown menu to its right. The main content area is titled 'TAX-FREE SAVINGS PLAN' and includes a note about required fields. The section is titled 'Primary beneficiary' with a help icon. A descriptive paragraph explains that the primary beneficiary receives proceeds upon death and can be a person or organization. At the bottom, there are two green buttons: 'Add person' and 'Add organization'.

You must designate a trustee for any beneficiary that is **under** age 18

# Review and Submit

Plan type > More information > Contributions > Investments > Beneficiaries > **Review**

## Review

### About you

Name: Mary Wilson  
Date of birth: December 15, 1968  
Social Insurance number : 356 384 479  
Gender: Female

Address:  
330  
University Ave  
Toronto, ON  
M5G 1R8

Phone: (555) 555-5555  
Alternate phone: (555) 555-5556  
Email: marib@gmail.com

Employer number: 111111  
Date of employment: January 3, 2022  
Province or territory of employment: ON

[View](#)

### Plan types - more information

Date joined plan: January 3, 2022  
Are you a connected person? No

About your spouse/partner:  
Name: Mike Wilson  
Date of birth: December 15, 1968

[View](#)

### Contributions

When your application is approved, sign in to [www.gsmaccess.com](#) and go to [View your portfolio > Contribution details](#) to see contribution information for your plan.

### Investments

Some investment decisions have been made by your plan sponsor.  
Your investment decision(s) |  
Investor type: Balanced

Name of investment	Percentage
BALANCED PORTFOLIO (PSG)	100.000%

[View investments over](#)

### Beneficiaries

Primary beneficiary	Date of birth	% of benefit
Name: Mike Wilson, Spouse - Married	December 15, 1968	100

[View](#)

[Continue](#)

Confirm that the information is correct

# Want to join another plan

Plan types > Contributions > Investments > Beneficiaries > Submit

## Enrolment complete

You've successfully submitted your enrolment for the  
**TAX -FREE SAVINGS PLAN**  
Your enrolment confirmation number: 3953393614

Print or save a copy of [your summary](#) for your records.

If you have any questions, call *Access Line* at 1-800-724-3402, Monday to Friday, 8 a.m. to 8 p.m. ET.

On our *GRS Access* website you'll find features and tools to help you monitor and manage your plan.

[← Enrol in another plan](#) [Sign out](#)

Click Enrol in another plan

# Need Help

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## General Account questions

**1-800-724-3402**

8 a.m. to 8 p.m. ET  
Monday-Friday



## Registering for the website

**1-888-222-0775**

8 a.m. to 8 p.m. ET  
Monday-Friday



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