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Global Pacific Financial Services Ltd.

Client Access

Submitted by Josh on October 22, 2014 - 10:15am

More policy information.
Less wasted paper.

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More policy information.
Less wasted paper.

Equitable Client Access is our secure online client portal where clients can view their policy information anytime - on their schedule. We?re dedicated to providing clients with a great online user experience and have continued to build enhancements to our online portal each year.

Clients have instant access to policy information, market values, investment allocations and transaction details. We?ve also recently added some self-serve options that allow clients to update their address, bank account, beneficiary, and pre-authorized debit information. Thousands of clients have already signed up for **Equitable Client Access** and are enjoying the benefits of accessing their policy information at their convenience.

With so much policy information now available online, many of the paper confirmation notices that are produced have become redundant. As such, beginning October 24, 2014 we will no longer be mailing confirmation letters for the following types of transactions made within a Savings and Retirement policy: subsequent deposits under $10,000, surrenders, GDA roll overs, and fund switches. Instead, clients will be able to see their confirmation letters and additional information sooner, by logging on to**Equitable Client Access**.

Advisors will continue to receive Savings and Retirement confirmation notices through**EquiNet**, our advisor online portal. Beginning October 24, 2014 confirmation letters for deposits under $10,000 will no longer be produced.

If your clients have not signed up for**Equitable Client Access**, direct them to client.equitable.ca - it only takes a few minutes to set up an account, and connects your clients with their policy information online ? anytime!