

Updating a policyholder's address



Always **verify the client's identity** before updating their address. If an address is updated without identity verification, a third party might receive confidential information or a cheque.

Only a policyholder is authorized to request an address change.



Multiple policyholders

Correspondence is sent to the first policyholder.

Ask if the address change applies to all policyholders. If so, make the change for each of them.

Don't change the address yourself if:



- Someone other than the policyholder has requested the change
- The person requesting the change is acting under a power of attorney (notarized or otherwise)
- A proxy decision maker has been named
- A claim is being processed

Submit these address change requests to the Customer Contact Centre.

Log into Webi and click **Client's Portfolios** in the toolbar.



Client's Portfolios

Search for and select the policyholder, then go to the **Client Information** tab.

Search | **Client Information** | Portfolio Summary | Fun



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In the **Address** section, make sure that the **Policy Number** field lists all of the policyholder's policies.

If all the information is correct, click **Change**.

! If a policy is missing or a number is incorrect, contact the Customer Contact Centre to make the address change.

Policy Number
010QUIE266, 066925832I, 010ACPL05

Change

In the **Standardized Canadian Address** section, enter the policyholder's new address in at least 2 of the 4 fields and click **Search**.

! If the address search doesn't return any results, an error message will appear.

If the address you entered is correct but the search fails to produce any results, refer to the [Non-Standardized Address](#) section.

Standardized Canadian Address

Street No.	Postal Code	Address/Rural Route/PO Box
319	J2L 2S5	

✘ Please correct the following information:

- Your search has failed to produce any results. Please start again.

A list of addresses will appear in the **Search Result** section. Select the correct address.

Search Result

- 319 CH DU LAC-GALE BROMONT QC J2L 2S5
- 319 CH DU LAC-GALE BUREAU [100-101] BROMONT QC J2L

Standardized Canadian Address

In the **Additional Delivery Information** section, you can add:

- an apartment number
- a suite number
- a unit number
- the recipient's name, if it's different from the policyholder's name (e.g., Harry Potter)

Additional Delivery Information	Unit Type	Unit No.
	[SELECT] ▼	3
C/O	[SELECT]	
Harry Potter	APARTMENT	
	SUITE	
	UNIT	

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Non-Standardized Address

Click the **Non-Standardized Address** link.

Non-Standardized Address

PO Box Municipality

Fill in the required fields.

Non-Standardized Address

Country

Line 1

Line 2

Line 3

Municipality Province

C/O

The **Start Date** is the current date by default.

You can change it if the policyholder hasn't moved yet.

Our system will keep the current address until the selected date.

Start Date (yyyy/mm/dd)



Start Date (yyyy/mm/dd)

You can change or add a phone number or email address.

Telephone Nos. and Email

Type	Number	Extensio
<input type="text" value="HOME"/>	<input type="text" value="514-363-7376"/>	<input type="text"/>
<input type="text" value="BUSINESS"/>	<input type="text" value="514-364-4000"/>	<input type="text"/>
<input type="text" value="[SELECT]"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="[SELECT]"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="[SELECT]"/>	<input type="text"/>	<input type="text"/>

Email

Make sure that all the information you've entered is correct, then click **Save**.