Requesting a change of banking information



Any changes in banking information must be submitted at least 7 days before the next withdrawal date.



To **change credit cards**, either you as the advisor* or the owner of the card must call the Client Relations Centre at 1-888-558-5525.

Once you've logged into Webi, click the **Services Inquiries** icon.

You can also access it from your client's Portfolio Details in **Client's Portfolios**.



Service Inquiries

Payment Information

Modal Premium: 77.40

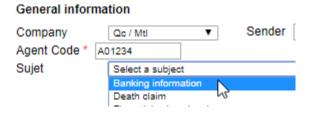
Method of Payment: Pre-authorized cheques

Paid to Date: 2025-06-01

Banking Information: 202**-****366

Draw Day: 1 Modify banking info

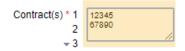
In the **Subject** drop-down menu, click **Banking** information.



Fill out the **General information** section making sure to check the boxes of the desired recipients.



Add the policyowner's info — First and last name OR Company — and be sure to indicate which policies are affected by the change.







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Enter the new banking information. The payor must be the same as Banking Information the current payor. To change Branch 12345 Bank 000 Accour \bigcirc payors, you must send us a new (incl. vali Pre-authorized debit agreement -PAD (09312E). Choose a monthly PAD draw day between 1 and 28. Withdrawal PAC draw day For universal life policies with depleted accumulation funds, the draw day must be the same as or earlier than the policy anniversary date. Additional information The banking institution has changed. **Add any information** you think is important.

Click **Send** once you've completed the request. You'll receive a confirmation email within minutes.





