

# 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**.

## General information

Company  Sender

Agent Code \*

Sujet

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

## General information

Company  Sender

Agent Code \*

Sujet

Recipient(s)\* ☒ Contract Administration ☐ Annuities

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

Contract(s) \* 1   
 2   
 3

\*For security reasons, it is recommended that the card holder makes the call.

# Requesting a change of banking information

Enter the new **banking information**.



The payor must be the same as the current payor. To change payors, you must send us a new Pre-authorized debit agreement – PAD (09312E).

## Banking Information

Branch  Bank  Account   
(incl. valid)

Choose a **monthly PAD draw day** between 1 and 28.



For **universal life policies with depleted accumulation funds**, the draw day must be the same as or earlier than the policy anniversary date.

Withdrawal  
PAC draw day

  
5  
6

Add any information you think is important.

## Additional information

The banking institution has changed.

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

Send

Close