

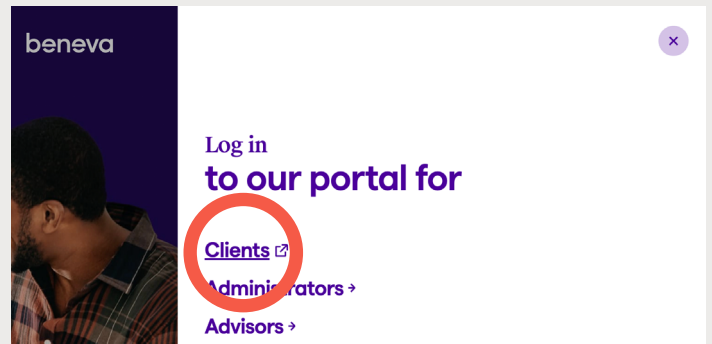
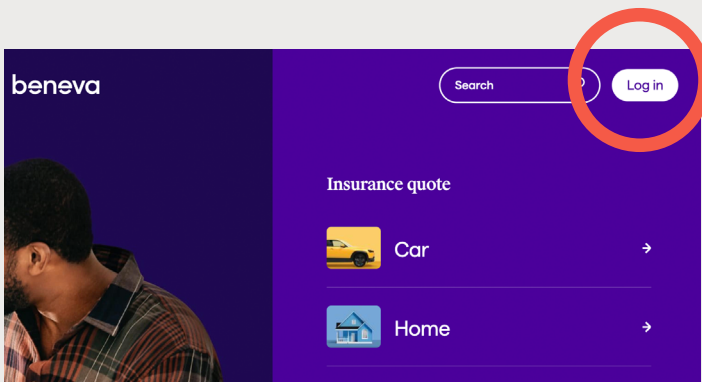
Creating your Client Centre account



Head over to beneva.ca and log in to the Client Centre.

1. Click the **Log in** button at the top of the screen.

2. Select the portal for **Clients**.



beneva

You'll arrive on our **Log in** page. Welcome!

3. Select the **Create your account** button.

The screenshot shows the 'Log In' page with fields for Email and Password, a 'Remember email address' checkbox, and a 'Log in' button. Below these is a link for 'Forgot your password?'. At the bottom, there is a section titled 'Don't have an account yet?' with a sub-header 'The Client Centre makes it easy to stay on top of your insurance and investments 24/7.' and a purple 'Create your account' button highlighted with an orange border.

4. Enter your personal info and click **Next**.

*Your information must match the information you provided Beneva.

The screenshot shows the 'Create your account' page with the heading 'Enter your personal information.' and fields for First Name, Last Name, Date of birth (YYYY-MM-DD), and Postal code. A purple 'Next' button is at the bottom.

5. Enter the email address you'll be using to log in to your account. And one more time, click **Next**.

The screenshot shows the 'Your email' page with the heading 'Enter the email address you wish to use to log in to your account.' and an email input field. Below it is a checkbox for 'I have read and agree to the terms of use' and a purple 'Next' button.

You're nearly there! Just a couple more steps.

6. **Check your inbox.** We've just sent you a message to confirm your email address.

The email you just received includes a link to create your password.

Click the link.

The screenshot shows an email notification with the heading 'Keep an eye on your inbox'. The body text says: 'We just sent you a message to confirm your email address. It includes the link you'll need to finish creating your account. If you don't get the email within a few minutes:'. There are two bullet points: 'Make sure the email address is correct.' and 'Check your junk mail (spam)'. At the bottom, it says 'Didn't get an email? Call us at 1 855 747-2233'.

The screenshot shows an email from 'beneva' with the heading 'Hello,'. The body text says: 'You're almost done creating your account! Now that we've confirmed your email address, it's time to choose your password.' Below this is a purple 'Create a password' button. At the bottom, it says: 'If you didn't try to create an account in the last few minutes, contact us at technicalsupport@beneva.ca or 1 855 747-2233'.

7. **Create your password.** (Make it a strong one!)

The screenshot shows the 'Create your password' page with the heading 'Your password must:'. There are three requirements: 'Be at least 8 characters long', 'Not include your name', and 'Not include your email'. Below these is a password input field and a purple 'Next' button.

Confirm your identity

There are two options:

8a If there is a cell phone number indicated in your file, confirm it.

ID confirmation

We just want to confirm you're... you!

It's easy, we'll text you a security verification code. Just enter the mobile phone number we have on file for you: XXX XXX-XXXX.

Security code verification
Enter the 6-digit single-use code sent to xxx xxx xxxx.

Security code verification

A 6-digit single-use code has been sent to XXX XXX-XXXX.

This code will expire after 15 minutes.

Enter security code:

8b Provide proof of the products you hold.
Enter the reference number of the product you hold.

Enter a reference number

Enter the reference number of one of your savings or investment products to confirm that you are the owner.

Find your number

If so, you must provide proof that you hold the product
Go to step 8b.

9. Your account is created once your information is validated. The log-in page will be displayed.

That's a wrap!

You've created your Client Centre account.

Log In

 Remember email address

[Forgot your password?](#)

Don't have an account yet?

The Client Centre makes it easy to stay on top of your insurance and investments 24/7.




10. Activation of the two-step authentication
Make your account safer with two-step authentication.
Activate it now

Enable two-step authentication

To protect your account and personal information from unauthorized access, we recommend activating two-step authentication immediately.

11. Once you log in, you will land on the My products page.
With the Client Centre, you can view your life insurance policies, statements and investments online.

My products

-  Life and health insurance
 - Loan Collateral Fund V16506331
 - Basic Contractual Premium 016240504
-  Savings and investments
 - Investment summary
-  High-interest savings account
 - Account balance

Specific conditions for external funds

For External Funds, please enter your client number to view the product details. This step must be completed when you first log in, since the data is hosted outside Beneva's systems. Access to your information will be available within 24 to 48 hours.

beneva My products Inbox Contact us Fr CR Caroline R. ▾

External Funds

Access to your external funds portfolio allows you to view the following products :

- Investment accounts
- Segregated funds

Request to have access to your external funds portfolio
Please give the following information to request access to your external funds portfolio.

Client number

Enter the client number indicated on your investments statement.

Cancel Submit

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