

## User Guide – Canada Life International products

YOUR Platform can be held within some Canada Life International (CLI) policies. The eligible policies are:

- Premiere Account
- Premiere Europe Account
- Wealth Preservation Account
- Wealth Preservation Europe Account

### Important considerations

Using YOUR Platform within the relevant CLI Bond still requires the use of the bond directly from CLI and this should be opened as normal. Charges for these products is made in addition to the YOUR Platform charges, CLI charges can be obtained directly from them.

### Administration considerations

- Adviser charges will need to be set on the bond wrapper itself direct with CLI, they cannot be facilitated by YOUR Platform
- Platform (and DFM where relevant) charges are applied on YOUR Platform as normal including any family linking with other platform accounts/clients
- Payments in and out will need to be made via the parent Bond wrapper with CLI, no money can move to or from the YOUR Platform account directly

### Opening process

- You should open the required account with CLI directly confirming the assets will be held in a third party platform account. This is confirmed by completing the Investment Administration Form noting SECCL as the custodian
- Once you have the CLI policy number, create a YOUR Platform Account for the client
  - The CLI bond's policy name should be used for the account name
  - Wrapper Type is 'third party offshore bond'
  - For scheme product, select the relevant provider
  - Enter the CLI policy number as the 'Product provider Account Reference'
  - Enter the bank details for the CLI Bond bank account, these will be provided with the opening details from CLI or can be obtained from them directly
- Once YOUR Platform account is opened email the CLI representative as follows:

INVST - <YOUR Platform account reference>

"I can confirm that the account has been setup in the name of Canada Life International"

### **Payments into the plan**

You will need to instruct payments into the YOUR Platform account via CLI. They will be matched on YOUR Platform and any investments made as per a normal platform account.

We are able to accept transfers to the platform from other/previous platform accounts held within an eligible CLI product. Contact [Questions@YOUR-Platform.co.uk](mailto:Questions@YOUR-Platform.co.uk) for assistance.

### **Withdrawals**

Any withdrawals instructed from the YOUR Platform account will move back to the bond wrapper for you to process as per the usual CLI processes.