

How To... set up Online Contributions

to your Group RRSP, TFSA & RESP



Contribute to your group plan with online banking - it's fast, easy and secure.

You can now use online banking to make contributions from your bank account to your (personal or spousal) Group Registered Retirement Savings Plan (RRSP), Group Tax-Free Savings Account (TFSA) and your Group Registered Education Savings Plan (RESP).

What to do

1. Sign in to your personal banking website.
2. Search for "Canada Life" in the bill payment section and choose the plan that applies to you:
 - GROUP RRSP
 - SPOUSAL GROUP RRSP
 - GROUP TFSA
 - GROUP RESP
3. Enter the following information to create the account number:
 - Your plan/policy number (5 digits) - ex: 12345
 - Your certificate number – ex: 000056789
(you will find this 9 digit number on your last statement or the welcome email when you first enrolled).

Sample Account Number

CANADA LIFE GROUP RRSP – 12345000056789

	12345	00000	56789
	plan/policy		certificate
	number		number

If you're contributing to a personal RRSP, select the CANADA LIFE GROUP RRSP and enter your plan/policy number and certificate number (without spaces).

Notes:

• **RRSPs:** When you make a personal RRSP contribution using the payee, CANADA LIFE GROUP RRSP, any instructions on file to direct a portion of your contributions to a spousal RRSP will apply. If you'd like to direct 100 per cent of your contributions to a spousal RRSP, add CANADA LIFE SPOUSAL GROUP RRSP as the payee and use the spousal certificate number.

• **RESPs:** Currently, online contribution is the only option for the Group RESP. Search for Canada Life in the bill payment section of your online banking, then select Group RESP.

If you have questions, call the Canada Life *Access Line* at 1-800-724-3402, weekdays between 6 a.m. and 6 p.m.

Capital Planning

Providers of your Voluntary Benefits Program

780-463-6128

1-800-661-8755

strategies@capitalplanning.ca

www.capitalplanning.ca