

web 

# YOUR BUSINESS CONNECTION





# Your business connection to Desjardins Insurance

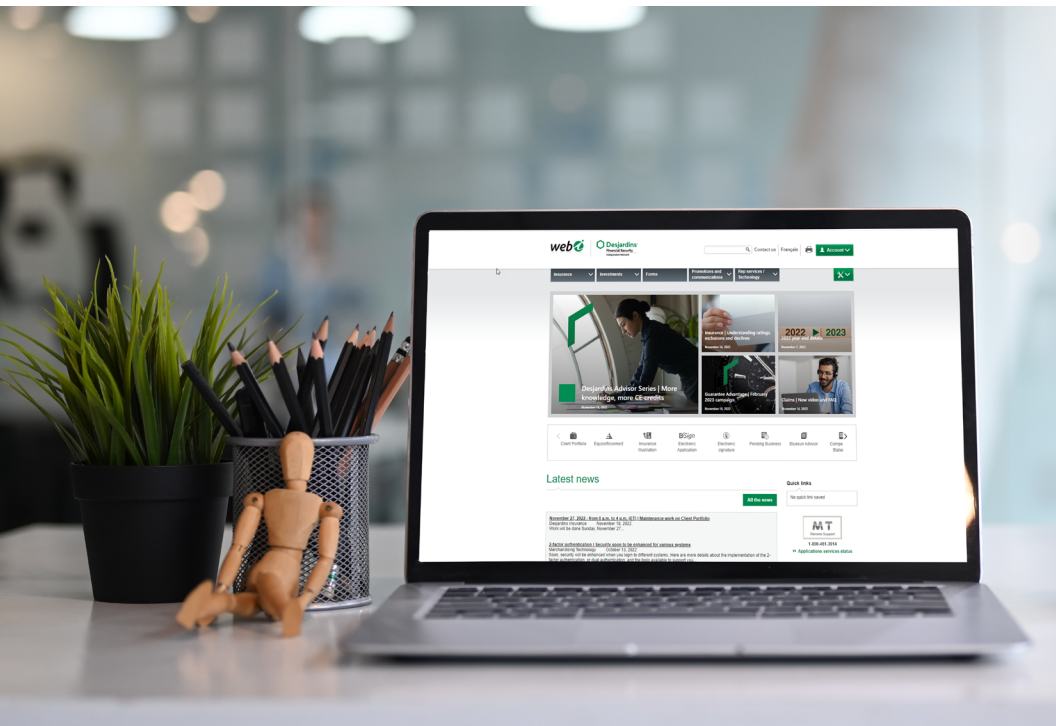
Webi is the Desjardins Insurance's extranet for advisors. It contains all the information and materials you need for business development.

## Your virtual office

Once you have your access codes, go to **webi.ca** and select the **Log in** button at the top of the page. Once you're logged in, you'll have access all the content available on Webi and to network-specific information, news and content.

You can browse through Webi without logging in, but you will only have access to general information.





**Webi is easy to use!**



## What can you use Webi for?

You can find information and supporting documents for all of our products in the **Insurance** and **Investments** menus. For each of our products, we've included features, target markets and sales materials, as well as sales approaches and concepts.

These tabs also contain the information and materials you need when you're ready to make a sale.

Insurance 	Investments 	Forms	Promotions and communications 	Rep services / Technology 
<b>Products</b>	<b>In addition</b>	<b>Marketing</b>	<b>Policy services</b>	
Life insurance	Financial needs analysis (FNA)	C clientele based material and products	Underwriting	
Participating life insurance	Additional coverages	Prestige Case Service	New business	
Universal life insurance	Underwriting requirements	Sales approaches	In-force administration	
Critical illness	Products available for conversion	Sales concepts	Claims	
Disability	Rates and ROI			
Healthcare	Rate reduction program			
Hybrid insurance	Regional sales directors			
Discontinued products	Newcomers guidelines			
	Assistance services			
	Remote sales			

If you're looking for a specific form, use the **Forms** tab to search by form name or number. The filters on the lefthand menu can make your search even faster!

The **Promotions and communications** menu contains resources that can help you develop your sales approaches, such as newsletters, videos and marketing materials.

The **Rep services/Technology** menu contains sales support tools, including our technological services, compensation, and other network-specific information.

## Use our applications to be more efficient

Use the toolbar on the home page to access your essential applications. \*



\* Only the applications linked to your account will be displayed.

## To help you with sales

- Direct access to the **Insurance Illustration** tool and the **Electronic application**
- Link to the **Dataphile** transaction management tool

## To help you manage your file

- **Client Portfolio, Equisoft** and **Clients Documents** are central locations for all of your clients' insurance and investment information
- The **Pending Business** and **Communications Profile** tools send you notifications for your files

You can also check out your **compensation statements** at any time.

## And so much more!

- Stay up to date on the latest industry trends, plus news from Desjardins Insurance and your network by checking the **news** published on the home page
- Use the **search engine** at the top of the page to quickly find the information you're looking for
- Add up to 10 pages, documents or forms to your **Quick links** section so you can access them in just one click!

### Quick links

- ▶▶ **Electronic application**
- ▶▶ **Pre-authorized debit agreement - PAD - Payors authorization - 09312E (PDF, 1 MB)**
- ▶▶ **Designation or Change of Beneficiary - 17073E (PDF, 375 KB)**

Edit

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## Need help?

Reach out to us using the **Contact us** link if you need any information about Desjardins Insurance products and services.

If you're having technical problems or can't log in, contact Merchandising Technology at 1-800-461-3914 or [mtsupport@dfs.ca](mailto:mtsupport@dfs.ca).

