Valuations - Canada Life

Last Modified on 07/08/2023 7:17 pm BST

Information to setup the valuation service with the provider is detailed below.

For further information, please refer to the valuation user guide.

Provider support	Adviser Connect team 0345 606 0708
telephone	09:00 – 17:00 Monday to Friday
Provider support email	adviserconnect@canadalife.co.uk
Provider website	www.canadalife.co.uk
Service Availability	Available 24 hours Monday to Sunday (subject to maintenance)
-	Individual Level
Access credentials for Pathways	
-	Individual Unipass certificate
Registration	To obtain valuations, you must first be registered to use Adviser Connect.
	Go to www.canadalife.co.uk and click on Login or Register. Go to Adviser
	Connect section and click Register with your Unipass certificate.
	Once your system administrator has approved your registration, you will be
	able to access valuations.
Message type	Individual real-time
Fund codes supported	SEDOL
	Provider internal code
Product types	Bonds
	Pensions
Setup guidance	Canada Life on-shore Bonds (unit linked and with profits) will have up to 8
	alphanumeric characters:
	ANNNNN
	ANNNNN
	NNNNNN
	A = Alphanumeric Character / N = Numeric Character
	A – Alphanumene Character / N – Numene Character
	Canada Life International off-shore Bonds (unit linked) will have a
	maximum of 7 digits (minimum of 5 numeric digits, but may have leading
	zeroes to a maximum of 7 digits). IoM policies have a "/" in place of the
	4th digit, and this will be used to identify the location
	aaa/nnnnnn
	a = 3 alphaumeric / $n =$ numeric
Notes	If you are already set up on Adviser Connect with a username and
	password, please contact your Account Manager or the adviser Connect
	team to arrange to delete your current profile. You will then need to re-
	register with Unipass.