

**SEND DOCUMENTS**

Share one or more documents with FundEX.

Start uploading files

**CLIENT SEARCH**

Client name or ID



[View all clients >](#)

**THE 360 NEWSLETTER**

- [Univeris](#)
- [Financial Needs Analysis Tool \(FNA\)](#)
- [Dashboard](#)
- [Segmentation](#)
- [Geolocation](#)
- [PureFees](#)
- [ARPA Survey](#)
- [FundEXQ12020](#)

**DOCUMENTS CENTRE**

Title



[Administrative Procedures](#)

[Fund Research](#)

[Guides and Training](#)

[GIC Rates](#)

[PODCASTS](#)

**USEFUL LINKS**

- [iACampus](#)
- [Financial Calculators](#)
- [Commission Statements / IA Advisor Centre](#)
- [Nominee Redemption Calculator](#)
- [Business Continuity and Transition](#)
- [Business Card Orders](#)
- [FUNDcom](#)
- [Anti-Spam Law - Status](#)
- [Interest Rate - Nominee Cash Account](#)
- [Personalized Web Pages](#)
- [Online Store](#)
- [Regulatory Organizations](#)
- [PPI.CA](#)

**UNIVERSAL LIFE INSURANCE**

Genesis: flexible life insurance that evolves based on YOUR needs!  
[To learn more >](#)



**GENERATE STATISTICS REPORTS**

From  
 2019-10-30

To  
 2020-07-06

- [Shared / Signed documents](#)
- [Client portal usage](#)
- [Client logins](#)