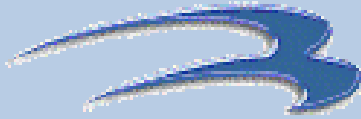


# Barrington Focus

## BARRINGTON HAS GONE FUNDSERV



**Barrington Wealth Partners**  
76 Temple Terrace, Suite 200  
Lower Sackville NS, B4C 0A7

### *Your MGA Team*

**Kim Gray**

*Vice President of Operations*  
[kgray@barringtonwealth.com](mailto:kgray@barringtonwealth.com)

**Kelly Westheuser**

*FundSERV Admin Manager*  
*VirtGate Trainer*  
[kwestheuser@barringtonwealth.com](mailto:kwestheuser@barringtonwealth.com)

**Mary Mellin**

*Contracting & Transfers Manager*  
[bwppcontracting@barringtonwealth.com](mailto:bwppcontracting@barringtonwealth.com)

**Jessica Fernando**

*Compensation Assistant*  
[bwppcommissions@barringtonwealth.com](mailto:bwppcommissions@barringtonwealth.com)

**New Business Department**

[bwppadmin@barringtonwealth.com](mailto:bwppadmin@barringtonwealth.com)

**Angela Gray**

*NB Division Coordinator*

**Lynn Barclay**

[bwppadmin@barringtonwealth.com](mailto:bwppadmin@barringtonwealth.com)  
New Business Department

**Maryanne Izzard**

[Maryanne@barringtonwealth.com](mailto:Maryanne@barringtonwealth.com)  
*Receptionist*

### **Barrington Wealth Partners MGA now providing you with the tools you need to produce consolidated client statements!**

Barrington is excited to announce that our segregated fund platform has been upgraded to an electronic one enabling the downloading of account information from the insurance companies directly into our VirtGate system. The electronic transmission line that allows for the downloading and uploading of seg fund data is provided by FundSERV, a non-profit company that acts as an intermediary between the fund/life co's and the MGA.

What does this mean to you? Well, this technology will allow you to produce consolidated client statements of both life, and investment business for clients from the comfort of your own office, home or anywhere that you have access to the internet. Also, seg fund purchases can be processed "same day" providing your clients with quick and efficient service. You can also view complete, up-to-date information on your client's seg fund accounts 24/7. Best of all, there is no cost for you to access this consolidated information.

We have been working with all of the insurance companies to ensure a fast, smooth and efficient transfer of data.

We are starting to move offices over to this platform one by one. We will contact your office for training prior to moving you over.

Remember that this system replaces the old Client Manager System. FundSERV replaces most reporting capabilities.

If you have any questions or concerns about this please feel free to contact Barrington New!!! Investment department at [bwppinvestments@barringtonwealth.com](mailto:bwppinvestments@barringtonwealth.com)



*Working together will only make us stronger*

# Focus on Current and up to date Contacts

As you all may be aware there have been several ongoing changes in departments at Barrington Head Offices. Below is an outline of each department and their contact information. Should you have any questions at all in regards to these departments please direct them to the VP of Operations – [kgray@barringtonwealth.com](mailto:kgray@barringtonwealth.com)

<b>Barrington Head Office</b>	
<p><b>Kim Gray</b> <i>VP of Operation</i>  <a href="mailto:kgray@barringtonwealth.com">kgray@barringtonwealth.com</a></p> <p>New Member / Shareholder Setup            Conference and Meetings            Budgets &amp; Accounting            Liaison with all Carriers</p> <p>ESCALATIONS - Policy Service, New Business, Contracting, Commissions, Investments.            Day to Day Operations &amp; Staff</p>	
<p><b>Kelly Westheuser</b>  <i>FundSERV Admin Manager/ VirtGate Trainer</i>  <a href="mailto:kwestheuser@barringtonwealth.com">kwestheuser@barringtonwealth.com</a></p> <p>FundServe Administrator            Marketing (Website/Newsletter)            VirtGate Training            Assistant to VP Operations</p>	<p><b>Email Mary Mellin</b>  <i>Contracting and Transfers Manager</i>  <a href="mailto:bwpcontracting@barringtonwealth.com">bwpcontracting@barringtonwealth.com</a></p> <p>Contracting/Transfers New Member Firms            Compliance            Renewals for License and E&amp;OE            Questions/Changes to Over Ride Rate</p>
<p><b>Angela Gray</b>  <i>New Business Account Manager</i>  <a href="mailto:angela@barringtonwealth.com">angela@barringtonwealth.com</a></p> <p>NB Requirements and follow-ups            Inquiries            Conversions/Policy Changes            Final Contract and Placement Date</p>	<p><b>Lynn Barclay</b>  <i>New Business Department</i>  <a href="mailto:bwpadmin@barringtonwealth.com">bwpadmin@barringtonwealth.com</a></p> <p>New Business Applications (paper/scanned)            Carrier Website Updates and Feeds            VirtGate Maintenance</p>
<p><b>Jessica Fernando</b>  <i>Compensation Assistant</i>  <a href="mailto:bwpcommissions@barringtonwealth.com">bwpcommissions@barringtonwealth.com</a></p> <p>VirtGate Commission Postings            Commission Statements            Compensation Inquiries</p>	<p><b>Maryanne Izzard</b>  <i>Receptionist</i>  <a href="mailto:maryanne@barringtonwealth.com">maryanne@barringtonwealth.com</a></p> <p>Reception            Distribution</p>
<p><b>General Support Email</b>  <a href="mailto:bwpsupport@barringtonwealth.com">bwpsupport@barringtonwealth.com</a></p> <p>Barrington's Website Changes/Additions            Carrier Access/Supplies/Software            Life Guide Technical Questions            Send copies of E&amp;O and Licenses            to this email.</p>	
<p><b>Leo Penney</b>  <i>Large Case Underwriting Consultant</i>  <a href="mailto:leo@leopenney.com">leo@leopenney.com</a></p> <p>You can also contact Leo Penney @            Toll: 866-810-0115            Cell: 416-276-1108</p>	<p><b>Jack Shaffer</b>  <i>Advanced Case Consultant</i>  <a href="mailto:jshaffer@barringtonwealth.com">jshaffer@barringtonwealth.com</a></p> <p>You can also contact Jack @            Toll: 866-810-0115            Cell: 604-880-9589            Bus: 604-639-3108</p>

## Focus on New Business

### Welcome to Barrington's Scanned NB Applications Program

It's quick and easy, just follow the below steps:

1. Print off this one of these cover letters – [Empire Life](#) / [Manulife](#)
2. Place your application and documents in order behind the attached form
3. Scan all documents very clean and straight
4. Upload to VirtGate under your client record
5. Email directly from VirtGate [bwadmin@barringtonwealth.com](mailto:bwadmin@barringtonwealth.com)
6. Send original with all documents and cheques to Barrington
7. We send a daily cheque log
8. Applications will remain here for boxing and shipping to carrier for storage

### *Enchantments to Sun Life's Underwriting process*

Effective June 29, 2009, the new requirements come into effect. They include:

- Removing MVRs (Motor Vehicle Record) for clients ages 66 or more if the face amount is \$2.5 million or less.
- Replacing medicals with paramedicals: For clients age 51 to 65 at amounts up to and including \$5 million of life insurance. This makes SLF's requirements one of the most liberal in the industry.
- Introducing **Vitals** (the measure of the client's height, weight, blood pressure and pulse) as a new evidence type.
- Life insurance: at ages 16 to 40 for amounts of \$250,000 to \$1 million, and at ages 41 to 50 for amounts \$250,000 to \$500,000, we are replacing the paramedical with vitals. Most of our competitors still use paramedicals.
- Critical illness: at ages 20 to 40 for amounts of \$250,001 to \$1 million, and at ages 41 to 50 at \$100,000 we are replacing paramedicals with vitals.
- Removing the saliva or urine HIV requirements for ages 16 to 40, for life insurance amounts of 100,000 to \$249,999 and for ages 16 to 50, for critical illness amounts under \$100,000.

These changes will ensure that SLF underwriting remains a leader in the very competitive Canadian market place, with an improved customer and advisor experience.

On June 29 the evidence requirements currently in Eos will be obsolete, will be updated on June 26, 2009, and should become your main source of information.

### **VirtGate A one stop shop...**

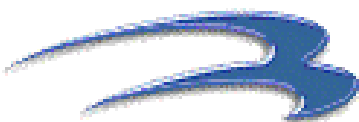
As you all may be aware you now have the ability to order your meds through VirtGate. Here is a listing of all Med companies that you can order from

Hooper Holmes  
Quality Underwriting  
Medisys  
Watermark  
Exam One

### **New!!! New Business Pending Feeding Coming Soon to VirtGate**

We are currently in the progress of getting New Business pending feeds for **Industrial Alliance**. These feeds will work like the other New Business pending Feeds that are currently set up. On a daily basis your pending requirements will Be opened in your client file, updated and closed according to the carrier.

We hope to add the following carriers as well soon – Transamerica



# Focus on up to date Application, Form & Software

## BMO

Life & Critical Illness - 126E **NEW!!!(2009/05/01)**  
French App -126F

## Empire Life

Life & Health - D-0082 -Eng (09, 2008) - French App D-0082FREN

## Manulife

Life & CI - NN7000E (03/2009) - French App -NN7000F  
*Do not Use Life & CI app after Dec 31, 2009*  
Disability - NN7008E (09/2008) - French App -NN7008F  
Living Care - NN7009E (12, 2008) - French App - NN7009F

## Standard Life

Life & CI Express - 5072 (10, 2008) French App - F5072  
Life & CI Long App - 5071 (10, 2008) French App - F5071

## Transamerica

Life Long App - LP257 **NEW!!(09/09)** - French App - LP257FR  
Life Short App- UW-LP411 **NEW!!(09/09)** - French App - LP411FR  
Single Premium Annuity - IP -NB151 (10, 2008) - French App -  
IPNB151FR

## Canada Life

Life & CI - 17-8299 (06/09) - French App 405FR  
Disability & CI - F541 (5/08) - French App F541(CL)(F)  
\*\*Forms are not available on Form Depot\*\*

## Industrial Alliance

Life - F1A (09/03) - French App - F1  
Snapp App - 6039 (01/09))

## RBC

Life - 89604 (08/2008) - French App - 89605  
Life -Quebec Res. English 81642 - (12, 2007)  
Life - Quebec Res. French App - 81643 (12, 2007)  
Disability & CI - 83530 (05/07) - French App - 83531

## Sun Life

Life & CI - 810-2799 (01/09) - French App - 820 -2799  
Rapid App - 810-2815 (01/09) - French App - 820-2815  
Annuity - 3318 (06-2008) - French App - 3494

## **New !!!** Equitable

Life & CI - 350 (07/09)  
Short Form for Life & CI - 351 (05/08)

There are several ways in which you can obtain applications & forms.

1. **Form Depot** - this is a database of all printable apps & form that is located in VirtGate.
2. **Paper** - should you require a supply on hand you can send your request to the below contact.
3. **Carrier Website** - Most carriers have all apps, forms and software available online to download.

All inquiries on supplies should be directed to the Inforce Sales & Marketing department:

[bwpsupport@barringtonwealth.com](mailto:bwpsupport@barringtonwealth.com)

## Current Software releases

AIG - Wave 19.0 May 2009

Canada Life - Zoom 10.5 May 2009

Empire Life - Envisions 8.5 March 2009

Industrial Alliance - Interface 5.6.1 August 2009

Manulife - Diamond View Version August 2009

RBC Life - Verision 2.4

Standard Life- Wealthcare Version 29 April 2009

Sun Life - EOS Version 4.4 March 2009

Transamerica - Lifeview 6.3 March 2009

Equitable - Version 2009 - June 09

**Equitable Life** has recently been added to our list of MGA contracts. If you have been contracted with Empire life and require access to the site please contact

[bwpsupport@barringtonwealth.com](mailto:bwpsupport@barringtonwealth.com)

Should any of your advisors be interested in contract with Equitable please forward your request to

[bwppcontract@barringtonwealth.com](mailto:bwppcontract@barringtonwealth.com)



# Focus on Seg Funds

For all your investment inquiries please feel free to contact Barrington  
NEW!! Investment Department @ [bwpinvestments@barringtonwealth.com](mailto:bwpinvestments@barringtonwealth.com)

## **Manulife Investments**

- September 2009 [Product Changes](#)
- [Forms & Applications](#)

## **Mackenzie Financial**

- [Fund Name changes & Closures](#)
- [Forms & Applications](#)

## **Sun Wise - CI Investments**

- [Forms & Applications](#)
- [Important Changes to Sun Wise Elite Plus](#)

# Focus Policy Service

Please note that all policy service requests can go direct to the carrier with the exception of the following:

## **Transamerica:**

**Address changes** – Please forward to [bwpadmin@barringtonwealth.com](mailto:bwpadmin@barringtonwealth.com) – The MGA has the capability to change this online for you without client or advisor signature. If you forward direct to Transamerica you will be required to provide a client signature

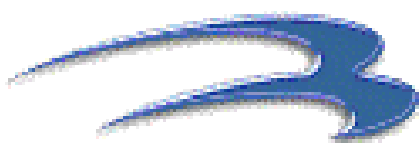
**Inforce Quotes** – Please forward to [bwpadmin@barringtonwealth.com](mailto:bwpadmin@barringtonwealth.com) our NB & POS department will initiate the request for you. These requests can take up to 5 business days to get back

Should you be redirected back to your MGA please send your request through to our NB & Policy Service Department at [bwpadmin@barringtonwealth.com](mailto:bwpadmin@barringtonwealth.com) we will gladly help you out

## **Carrier Contacts**

Can also be found in VirtGate under “What’s New”

[BMO](#)  
[Canada Life](#)  
[Empire](#)  
[Equitable](#)  
[Industrial Alliance](#)  
[Manulife](#)  
[RBC](#)  
[Sun Life Financial](#)  
[Standard Life](#)  
[Transamerica](#)



## **Sun Wise CI Investments**

All Sun Wise CI Application include a copy that is supposed to be sent to the Dealer. Please make sure that this copy of the application with a copy of all required documents is sent to Barrington, see below address.

## **Mackenzie Financial**

Please note that all Mackenzie Seg Fund application must be sent to Barrington. As the Dealer, Barrington needs to Sign off on all Applications. Please forward along all applications and required documents to;

**Barrington Wealth Partners Inc.**  
**Attention: Investments Department**  
**76 Temple Terrace, Suite 200**  
**Lower Sackville, NS B4C 0A7**



# Focus on upcoming Events

## Barrington 2009 Annual Advance Marketing Meeting

This year it is being held at the [Opus Montreal](#) October 22<sup>nd</sup> – 25<sup>th</sup>, 2009



### Event overview

#### Thursday October 22<sup>nd</sup>

*Travel Day - Check into Hotel Opus Montreal  
Reception 6pm - KoKo Lounge*

#### Friday October 23<sup>rd</sup>

8:00 - 9:00	Breakfast	Godin
9:00 - 12:00	Marketing Meeting	Godin
9:00 - 12:00	Group Meeting	Succo
12:00 - 12:15	Lunch - Working	Succo
12:15 - 3:00	Marketing Meeting	Godin
4:00 - 6:00	Shareholders Meeting	Godin
6:00 - 7:00	Cocktail Reception	Suco
7:00 - 9:00	Dinner	Suco

#### Saturday October 24<sup>th</sup>

8:00 - 9:00	Breakfast	Godin
9:00 - 12:00	Marketing Meeting	Godin
12:00 - 1:00	Lunch	On your own
1:00 - 4:00	Marketing Meeting	Godin
6:00 - 7:00	Hospitality Suite Open	To Be Announced
7:00 - 9:00	Dinner	Da Emma

#### Saturday October 25<sup>th</sup>

9:00 - 10:00 Am	Breakfast	Godin
10:00 Am	Board of Directors Meeting	Godin

*Travel Home*

**!!!Don't forget Barrington's website!!!!**

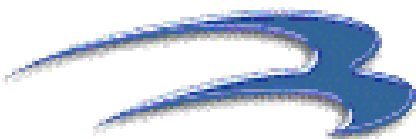
You will find a link to all carrier website's for easy access to printable forms  
Links can be found under "Our Services"

**Barrington's Website-  
[www.bwpartners.com](http://www.bwpartners.com)**



### We would like to hear from you too

If there is any new exciting news happening in your office that you would like to share please feel free to contact us. Anything from weddings, engagements and little bundles of joy, please forwarded to [kwestheuser@barringtonwealth.com](mailto:kwestheuser@barringtonwealth.com). We will make sure that we let everyone know. – THANK YOU TO THOSE WHO SENT SOMETHING IN...☺



# Focus on YOU

## April Brain Teaser

Winner!!!!

Maggie Jessup – DPB Insurance  
Answer: An Umbrella

## October Brain Teaser

How did the big mountain know that the little mountain was fibbing?

Everyone that sends in an Answer prior to October 30th will be put into a draw. Monthly prizes will be given out.

Send all Answers to [kwestheuser@barringtonwealth.com](mailto:kwestheuser@barringtonwealth.com)

The answer along with the winner will be announced in the follow issue.

Goals are the fuel in the furnace of achievement.

**Brian Tracy, Eat that Frog**



## Penguin Appetizers – Provided By Caroline Selkirk ZLC Financial

Ingredients and equipment:

1 can jumbo olives

1 can small olives

Toothpicks with flair on top


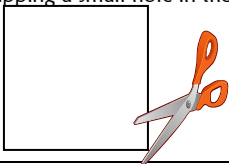

8 oz. Neufchatel cheese at room temperature

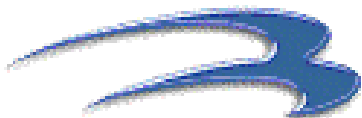
Small zip-top bag (sandwich size)

Scissors

Sharp knife

Colander

Child	Parent
Wash and peel a carrot.	Cut the carrot into rounds about 1/8" thick. Cut a triangle out of each round like this:
	 <p>Reserve triangles to be beaks of penguins. Each beak will need to be cut to 1/16" thickness to fit into olive. Feet should remain 1/8" so that the toothpick will have something to stick in to hold penguin together.</p>
	Open a can of jumbo olives and a can of small olives.
Drain the water off of the olives, one can at a time and place into two bowls.	Prepare neufchatel cheese by placing in zip-top bag and snipping a small hole in the corner like this:
	
Begin assembly process. Take a jumbo olive to be the body and hand to parent.	Cut one side of the olive apart lengthwise. This will make space for the Neufchatel. Stretch the olive open and squeeze Neufchatel into cavity to create penguin body. Place filled olive on carrot feet base.
Hand a small olive to parent.	Cut a slit in the side of the olive horizontally for the beak to go in like this:
	 <p>Insert beak into slit. Place head on body.</p>
Hand parent toothpick.	Insert toothpick through small olive, then jumbo olive and into carrot feet. Place on serving plate.



**Barrington would like to send out a**

**BIG Congratulations!!!**

**Jackie Murphy & Rob Black**

**Baby Boy Gavin Patrick Black**

**Born August 29th, 2009**