

Licensing Journey

Your step-by-step roadmap to becoming a licensed WFG Associate - Invictus Leadership Group

STAGE 1 — ENROLLMENT

- **Register for Oliver's HLLQP Flex Pass**
 - Complete registration/payment (\$79.85 + tax • 2 months included, then \$29.85 / month)
 - Ensure login credentials are saved
 - **Register for WFG Launch**
 - Set up WFG Launch account
 - Confirm access is working
-

STAGE 2 — CERTIFICATIONS

Complete all required certification courses, successfully pass the corresponding exams, and record the completion date for each certification.

Required Certifications:

- **CDN Ethics Certification**
 - **Ethics Certification**
 - **A&S Certification**
 - **Life Insurance Certification**
 - **Segregated Funds Certification**
-

STAGE 3 — PROVINCIAL LICENSING

Complete all applicable provincial licensing requirements, successfully pass the required exams, and record the exam/write date for each licensing component.

Provincial Licensing Requirements:

- **Provincial Ethics Requirement**
 - **Provincial Accident & Sickness (A&S) Requirement**
 - **Provincial Life Insurance Requirement**
 - **Provincial Segregated Funds Requirement**
-

STAGE 4 — ACTIVATION

Complete all post-licensing activation requirements to fully onboard the agent, including compliance documentation, contracting, licensing submission, system access setup, and final operational readiness.

Activation Requirements:

- **Obtain Police Clearance (\$28)**

- Order through Sterling BackCheck or visit a local RCMP detachment.

Sterling BackCheck: <https://pages.sterlingbackcheck.ca/landing-pages/w/world-financial-group-canada/>

- **Complete WFG Agent Agreement (\$42)**

- Log in to [WFG Launch](#) and complete the WFG Agent Agreement.

- **Cancel Speedpass (if applicable)**

- **Transition from WFG Launch to My WFG**

- Upon completion of the WFG Agent Agreement, it will automatically kick you out of Launch and set you up with MyWFG

- **Complete Ivori e-Contract**

- Log into [MyWFG](#)
- Navigate to Menu → Licensing & Appointments → Licensing → Ivori E-Contracting
- Follow the on-screen instructions to complete the contracting process.

- **Obtain E&O Certificate and Letter of Authorization**

- After completing the Ivori E-Contracting process, your Errors & Omissions (E&O) Certificate and Letter of Authorization will be sent to your email.

Processing Time: Approximately 1–14 business days.

- **Submit Alberta License Application (\$155)**

- Submit your Alberta Insurance License application through the Alberta Insurance Council portal: <https://www.abccouncil.ab.ca/>

- **Confirm License Activation**

- Once your license has been approved by the Alberta Insurance Council, email your license certificate(s) to:

wfgapprovedlicense@ivori.ca

wfgcanadalicensing@transamerica.com

- **Complete Office Setup and Software Access, including:**

- WFG Email and Platform Set-up
- Registration with Product Providers (IA, Manulife, Equitable, Ivori, CPP, etc)

- **Order Name Tag**

- **Complete Full Transition to My WFG and confirm onboarding completion**

- Confirm that all licensing, contracting, registrations, system access, and office setup requirements have been completed and that the agent is fully operational.