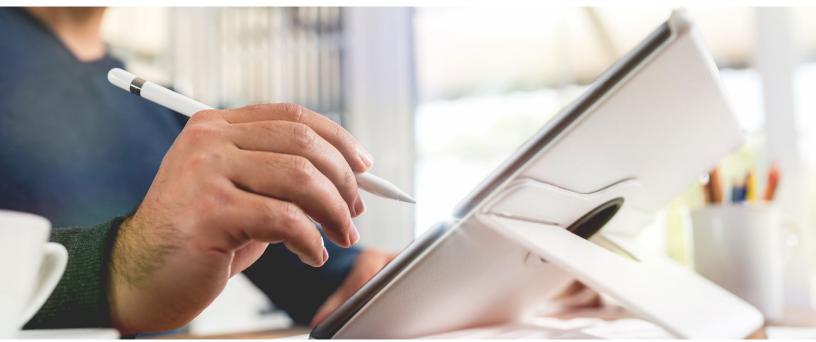
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Client review and signing of policy contract – Insured

This job aid will help you guide your clients through the review and signing process as the insured life. Once you have released the contract to your clients, they will receive an email from *ivari* (<u>ePolicies@ivari.ca</u>). (*Note: Please do not share this job aid with your clients.*)

If the owner and insured are the same, they only need to follow these steps once as the owner.

Upon receipt of the email from <i>ivari</i> , the client must click the link to proceed to the security confirmation process.	From: ivari ePolicies< <u>ePolicies@ivari.ca</u> > Date: Fri, May 1, 2020 at 6:51 PM Subject: Your ivari insurance policy is ready for review/Examen de votre police d'assurance ivari
	 Hello PETER WEST, Thank you for choosing ivari. Your ivari policy contract is ready for your review. To view and sign the contract, please use this link and follow the simple steps. When completing the required document(s), you will be guided to where you need to add information and sign. If you have any questions, please contact your advisor.
	Thank you, The <i>ivari</i> team This email was sent to from ivari as an activity notification. This is an automated message and direct replies to this address are not monitored. Terms of Use Privacy Policy Contact Us 500-5000 Yonge St., Toronto, ON M2N 7J8, Canada Copyright © 2020, ivari. All rights reserved.



A new webpage will open. The client must click the <i>"TEXT ME AT"</i> link to receive a security code. The client should be near the device receiving the security code as the code will only be available for 6 minutes.	Send Code For your security, you will receive a one-time passcode which will be valid for 6 minutes. Select the link below to receive the code. TEXT ME AT ******1754 Questions? Call 1-800-646-1481 (Mon to Fri, 8:00 a.m 6:00 p.m. ET) Terms of Use Privacy Policy Copyright © 2020, <i>ivari</i> . All rights reserved.
A new screen will appear. The client must enter the code from the text and click SUBMIT . If they make a mistake, they can click Start again to receive a new code. Note: The client has a maximum of 5 tries to enter the passcode correctly. After that, they must wait 5 minutes before they can request a new code.	Verify code Enter your verification code Verification code has been sent to your phone Start again SUBMIT Questions? Call 1-800-646-1481 (Mon to Fri, 8:00 a.m 6:00 p.m. ET) Terms of Use Privacy Policy Copyright © 2020, <i>ivari</i> All rights reserved.
The client will then be taken to the Policy contract review and signing page. Here they can review any messages that you have entered. Next, the client should click on the Review and sign your policy contract link.	Policy contract review and signing Client information Owner name: Policy #: Image: CollAPSE ALL An important message from your advisor Image: message to client. Your policy contract - for your review and signature. Review and sign your policy contract
At the top of the page, a message bar will appear. The client should check the box beside <i>"I agree to use electronic records and signatures"</i> and then click CONTINUE . Note: Each page of the policy contract should be carefully reviewed by the client before they sign the Delivery Receipt and amendments, if any.	Please Review & Act on These Documents

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When the client is ready to start the signing process, they	Please review the documents below.
must click the START button.	START DEX05(p) Envelope ID: FB38FFA2-120E-4DC3-MABB-44F20037I001 DEX0005TRATIOL DOCUMENT ONLY START PMOVIDE 01: 00:001601 VD0005001 00:001601
That will take them to the first spot in the document that needs to be signed.	xPression PRODUCTION OUTPUT
If the client needs to include comments related to a change in health, etc., they can use the insured comments section.	The above representations are true and complete except for the following details that are provided for consideration:
	Signed at on City, Province Date
	Owner's Signature Insured's Signature
	Name of Witness to all signatures Signature of Witness
The client must click on the Sign button to start the signing process as the insured.	The above representations are true and complete except for the following details that are provided for consideration:
	Signed at on Date
	Owner's Signature
	Name of Witness to all signatures Signature of Witness

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Using their mouse, stylus or finger, the client must draw their signature in the box.	Adopt Your Signature
The signature must be inside the box and must meet a minimum length requirement to be accepted by the system.	DRAW YOUR SIGNATURE Clear
Once satisfied, the client should click ADOPT AND SIGN .	I agree that this signature or initial wave the electronic representation of my signature or initial for all purposes when I (or my agent) use them on documents, including legally binding contraction fight the same as a pen-and-paper signature or initial.
They will automatically be taken to the next spot in the document that requires signing.	ADOPT AND SIGN CANCEL
Once all signatures have been applied, a message will appear at the top of the screen indicating that the process is complete. The client should click FINISH .	Donel Select Firsh to send the completed document. FINISH OTHER ACTIONS • C C L* C
A confirmation page will appear stating that the insured signing process is complete. The client can now close this webpage.	Your signing process is now complete. Thank you for choosing ivari. • You can logout now. • Your ivari insurance contract is now available for download. Thank you, ivari Questions? Call 1-800-646-1481 (Mon to Fri, 8:00 a.m 6:00 p.m. ET) Terms of Use Privacy Policy Copyright © 2020, ivari. All rights reserved.

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