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#### Client review and signing of policy contract – Owner

This job aid will help you guide your clients through the review and signing process as the policy owner. 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 would only need to follow these steps once.

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<@Policies@ivari.ca> 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 Frence Policies 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 thi link nd 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 tofrom <i>Ivari</i> 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 Stot-Stot Yonge St, Toronto, ON M2N 7JB, Canada Copyright © 2020, Ivari. All rights reserved.	
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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, ivari. All rights reserved.
A new screen will appear. The client must enter the code from the text and click <b>SUBMIT</b> . If they make a mistake, they can click <b>Start again</b> 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         Ouestions? 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 <b>Policy contract review and</b> <b>signing</b> page. Here they can review any messages that you have entered. Before moving on, the client should click on <i>Review the</i> <i>contract</i> to read through their contract.	Policy contract review and signing         Client information         Owner name:       Policy #:         COLLAPSE ALL         An important message from your advisor         Image: Collapse All         An important message from your advisor         Image: Collapse All         Mexicon Collapse All         Mexicon Collapse All         Mexicon Collapse All         Mexicon Collapse All         Image: Collapse All         Mexicon Collapse All         Mexicon Collapse All         Mexicon Collapse All         Mexicon Collapse All         Image: Collapse All         Mexicon Collapse All

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There may be additional forms that require review and/ or signature from the policy owner. The client should click on the <i>Review and Sign form(s)</i> link. The client must complete and sign all of the required form(s) before they are able to sign the policy contract.	Policy contract review and signing         Client information         Owner name:       Policy #:         Image: CollAPSE ALL         An important message from your advisor         Message to your client.         • form(s) - to be completed and signed before contract review and signature.         When completing the required document(s), you will be guided to where you need to add information and sign.         • Review the contract         • Review and Sign form(s)
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</i> <i>signatures"</i> and then click <b>CONTINUE</b> .	Please Review & Act on These Documents
When the client is ready to start the signing process, they must click the <b>START</b> button.	Please review the documents below. Q Q 보기 급 ③
That will take them to the first spot in the document that needs to be signed.	START DEußign Erweizen ID. 90225030-0882-48A3-A4C1-9F7A772D85ED DEMONSTRATION DOCUMENT ON LY PROVIDED BY DOCUSION ONLINE BIONING SERVICE 903 dA. Avs. Built TO - Sauth - 90000000 (Primage Storing 219-0200 903 dA. Avs. Built TO - Sauth - 90000000 (Primage Storing 219-0200 Www.docusign.com Toronto, ON M2N 728 Ivarica
Certain sections of the form(s) will be auto-populated.	Pre-Authorized Debit (PAD) for Insurance Products
Mandatory sections to be completed will be indicated in red.	OWNER(S)       Ivari Policy Number(s):       ARL PS4         Let Name       Inst Name       Inst Name         DEFERRAL       Inst Name       MISSIE         Let Name       Inst Name       MISSIE         OP Nor Onformation       Constant Sociality       Inst Name         Op Name       Miss O Other       Inst Name       Inst Name         Date of Birth (Constant Name)       Inst Name       Inst Name       Inst Name         Org       Prevince       Prevince       Prevince       Prevince         Org       Prevince       Prevince<

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If additional documents such as a pre-printed void cheque are required, the client must click on the paperclip icon to attach it.	PAD Withdrawal Information       Delase ATTACLIPERSONAUXED PRE-PRINTED VOID CHEQUE         Select one option:       Select one option:         • Establish a new PAD account (must attach preprinted void cheque or stamped bank letter)         • Use existing PAD account from <i>ivari</i> life policy no.:
The client must click on the <b>Sign</b> button to start the signing process as the owner.	Sign Signature of Owner
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 <b>ADOPT AND</b> <b>SIGN</b> .	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,
They will automatically be taken to the next spot in the document that requires signing.	ADOPT AND SIGN CANCEL
Once all sections have been completed, document(s) attached and signatures applied, a message will appear at the top left-hand side of the screen indicating that the process is complete. The client should click <b>FINISH</b> .	Concel: Click Finish to send the completed document.         Q



A confirmation page will appear. The client can now proceed to the signing of the policy	Thank you for signing the forms         • Please continue to sign the contract.         Thank you,
contract by clicking on <b>Contract</b> .	<i>ivari</i> Questions? Call 1-800-646-1481 (Mon to Fri, 8:00 a.m 6:00 p.m. ET)
It will take a few seconds for the <i>Review and sign your policy</i> <i>contract</i> link to be activated.	Terms of Use   Privacy Policy Copyright © 2020, <i>ivari</i> . All rights reserved.
This will bring the client back to the <b>Policy contract review</b> and signing page.	Other required and completed forms can be attached here. Note: Files must be sent as PDF, JPEG, JPG, PNG, TIFF or TIF.
If the client has completed and signed any other required forms, they can use the paperclip icon to upload those forms here, and then click <b>SUBMIT</b> .	Others: Link to ivari forms O file(s) selected. (Total upload limit is 15MB) Upload document(s) Upload document(s) UBMIT RESET
Any other documents or forms that you have uploaded for the client to review or complete will be available under the Other documents – for your review and download section.	Other documents - for your review and download.     Eeave at Home Package.pdf
The Leave at Home Package will always be included.	
Next they should click the <b>Review and sign your policy contract</b> link.	Your policy contract - for your review, signature and download.      Review and sign your policy contract      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.
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</i> <i>signatures"</i> and then click <b>CONTINUE</b> .	Please Review & Act on These Documents
Note: Each page of the policy contract should be carefully reviewed by the client before they sign the Delivery Receipt and amendments, if any.	

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When the client is ready to start the signing process, they must click the <b>START</b> button. That will take them to the first spot in the document that needs to be signed.	Please review the documents below.
The client should click in the Signed at field to enter the city and province that the contract is being signed in. The date and time field will auto-populate when the first owner has opened this document.	NEXT     Signed at     Toronto, Ontariol     o       Signed at     Only, Frontice     Date       Signed at     Signed at     Signed at       Big     Hunclientrativnin Cooclientsurnin       Owner's Signature     Insured's Signature
The client must click on the <b>Sign</b> button to start the signing process as the owner.	The Policy was delivered to me/us by:       My advisor personally       Mail/Courier       Other:         Required       Image: Constant of the c
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. Once satisfied, the client should click <b>ADOPT AND</b> <b>SIGN</b> . They will automatically be taken to the next spot in the document that requires signing.	DRAW YOUR SIGNATURE Clear John Signature or initial where the electronic representation of my signature or initial for all purposes when I (or my agent) use them on documents, including legally binding contract just the same as a per-and-paper signature or initial. ADOPT AND SIGN CANCEL



Once all signatures have been applied, a message will appear at the top left-hand side of the screen indicating that the process is complete. The client should click <b>FINISH</b> .	Donel Select Firsth to send the completed document.       C
A confirmation page will appear.	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.
The policy owner must download and save the policy contract to accept delivery before logging out. As the advisor, it is your responsibility to ensure that the client(s) has successfully downloaded their contract.	

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