

#### Advisor review of policy contract and signing

Once a policy has been signed by both the insured and owner, you will receive an email from <i>ivari</i> (ePolicies@ivari.ca). Click the <b>link</b> 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
	<ul> <li>Hello Servicing Advisor,</li> <li>Thank you for choosing ivari. Your client's ivari policy contract is ready for your review.</li> <li>To view and sign the contract, please use this link and follow the simple steps.</li> <li>When completing the required document(s), you will be guided to where you need to add information and sign.</li> </ul>
	Thank you, The <i>IvarI</i> team This email was sent to from <i>IvarI</i> as an activity notification. This is an automated message and direct replies to this address are not monitored.



A new webpage will open. Click the <i>"TEXT ME AT…"</i> link to receive a security code. You should be near the device receiving the code as it 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         Guestions? Call 1-800-646-1481 (Mon to Fri, 8:00 a.m 6:00 p.m. ET)         Tems of Use   Privacy Policy         Copyright © 2020, iver: All rights reserved.
A new screen will appear. Enter the code from the text and click <b>SUBMIT</b> . If you make a mistake, you can click <b>Start again</b> to receive a new code. Note: You have a maximum of 5 tries to enter the passcode correctly. After that, you must wait for 5 minutes before you can request a new code.	Verify code         Enter your verification code         Verification code has been sent to your phone         Summer         Summer         Summer         Summer         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, ivari. All rights reserved.
Once you have entered the correct code, you will be directed to the <b>Policy contract review and signing</b> page for the specific policy contract. Additional documents that the client(s) has completed will be attached; ensure that you open and review each one for accuracy. If any of the documents are incorrect or have missing information and/or signatures, please obtain the revised documents from your client(s). You can then upload those as you usually would in webcappow, under the <i>Delivery Requirements</i> section on the <b>Client information</b> page.	Policy contract review and signing         Client information         Owner name: VICCUENTSURINM         Policy #:SCTMV05         Image: CollAPSE ALL         An important message from your advisor:         Image: CollAPSE ALL         Image: CollAPSE ALL         Vicen completing the required document(), you will be guided to where you need to use information and sign         Image: Review the contract         Image: Review the contract         Image: Review the contract         Image: Review and Sign form()

Next, click the Review and sign your policy contract link.	Other documents - for your neview and download.     Leave at Home Package pdf     Nour policy contract - for your review, signature and download.  Review and sign your policy contract
At the top left-hand side of the page, a message bar will appear. Check the box beside <i>"I agree to use electronic records and signatures"</i> and then click <b>CONTINUE</b> .	Please Review & Act on These Documents
Before signing, review the policy contract again to ensure it is in good order. Then, click the <b>START</b> button to be taken to the Contract Placement List for signing. Review the Contract Placement List carefully to ensure all delivery requirements have been sent back by the client(s).	Present traverse the discussion of the discussion
Click the <b>Sign</b> button to begin signing.	Advisor Report         Instructions to Advisor:         • By signing and returning this form with a payment for the premium(s) due and with all delivery requirements listed above to place the policy. I confirm having delivered the policy and having reviewed the policy contract with the policyowner.         • To prevent delay in the settlement of the policy, provide permission in <i>Comments</i> section to draw required premium(s), including all back premiums from cleart's bank account, if applicable.         • If relissuing a policy specify the changes requested in the <i>Comments</i> section and submit together with any completed delivery requirements.         • If a policy is not taken provide the reason why in the <i>Comments</i> section.         Instructions from Advisor:         Comments

Using your mouse, stylus or finger, draw your signature in the box. The signature must be inside the box and must meet a minimum length requirement to be accepted by the system. Once you are satisfied, click <b>ADOPT AND SIGN</b> .	Adopt Your Signature  DRAW  DRAW YOUR SIGNATURE  Clear  Clear  Clear  I spree that this signature or initial will be the electronic representation of my signature or initial for all purposes when I (or my signature them on documents, including legoly bending contracts - just the same as a pen-and-peper signature or initial.  DDPT AND SIGN
Once your signature has been applied, a message will appear giving you the option to enter a note to ivari. This is optional.	Optional - Please enter your instruction Ac here Optional section, please add text here Date Delivered: 4/5/2020   11:21:06 EDT
Once all signatures have been applied, a message will appear at the top of the screen indicating that the process is complete. You can then click <b>FINISH</b> .	Open 2 Select (Frank) is provided document.       Image: 1 - 1 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 -
A confirmation page will appear.	Your signing process is now complete. Thank you for choosing ivari.         • You can logout now.         • Your war insurance contract is now available for download.         Thank you,         vari         Questions? Call 1-800-646-1481 (Mon to Fri. 8:00 a.m 6:00 p.m. ET)         Terms of Use ) Privacy Roley         Copyright © 2020, hear All rights reserved
On the <b>Policy Contracts</b> page in webcappow, the <i>View contract</i> field will have a <b>SIGNED</b> button, and the <i>Release to client</i> field will have a <b>VIEW</b> button.	Contract print (date         Policy #         Owner name         View coltract         End of delivery date         Advisor         Advisor         Destributor         Relieses to client           0LMAY2020         ENGLISH OWNER         SIGNED         0L/U22020         Test Agent         View         View

Click the <b>VIEW</b> button in the Release to client field to be taken to the <i>Contract release</i> <i>information</i> page.	Client information For security and privacy reasons wrong or incorrect email address * Manufatory field[s]	- please verify all email address uphone number, contact our eB	is and pbone numbers befo uninets Team	ore releasing the contract to the	clientți), Il you have sent a c	ontract in e	mon to a
Refresh your browser. A date will now appear in both the Notification sent date and the Contract signed date fields for both you and the client(s).	Name (Relationship)	Creat accress	Geliphone	Notification sent date	Contract signed data	Action	Email robilization
	MISSIE DEFERRAL (Owner/Insured)	Advantase citeratigas en con	10.00	20-06-2020 10:48:19 PM	21-06-2020 110-18 AM	60/T	RESEND
	MelssaSen-Adv Modeltestacct (Advisor)	Manageriter	10.000	28-06-2020 110333 AM	21-06-2020 1:14:50 AM	601	RESEND
Once a client has signed, this page is now locked and cannot be changed. If you have entered an incorrect email or cell phone number, please contact ivari's eBusiness team at 1-800-646-1481 immediately.							

#### For advisor use only

<sup>™</sup> ivari and the ivari logos are trademarks of ivari Holdings ULC. ivari is licensed to use such marks. IV2038 3/22