



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 (ePolicies@ivari.ca). (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. For prosperity Simplified Issue and Guaranteed Issue policies, the owner and the insured are the same and no additional signatures are required.

Upon receipt of the email from ivari, the client must click the link to proceed to the security confirmation process.

From: ivari ePolicies <ePolicies@ivari.ca>
Date: Thu, Jun 18, 2020 at 10:26 PM
Subject: Your ivari insurance policy is ready for review/Examen de votre police d'assurance ivari



Hello MISSIE DEFERRAL,

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 ivari team

This email was sent to [redacted] from ivari as an activity notification. This is an automated message and direct replies to this address are not monitored.


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This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

The client will then be taken to the **Policy contract review and signing** page.

Here they can review any messages that you have entered.

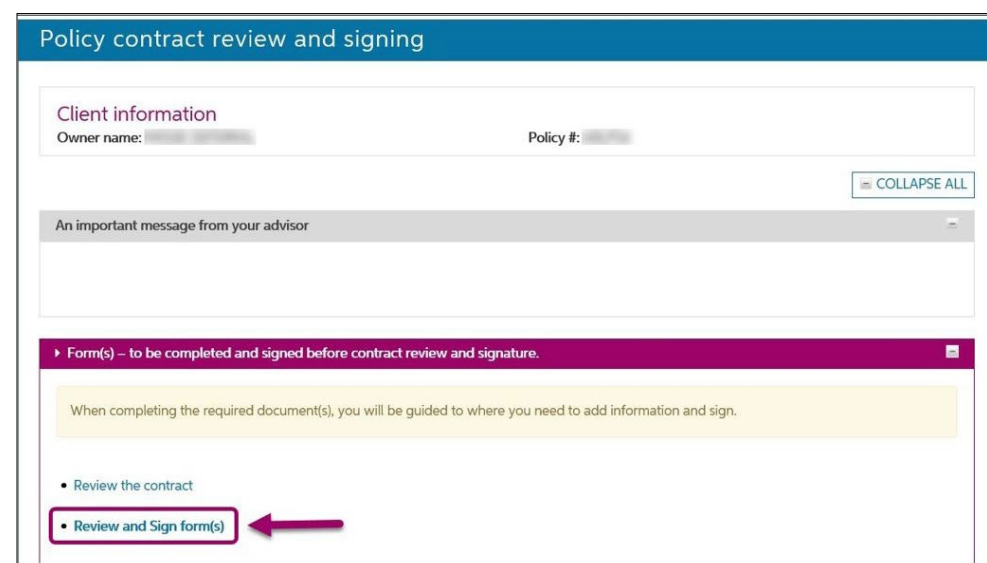
Before moving on, the client should click on *Review the contract* to read through their contract.



There may be additional forms that require review and/ or signature from the policy owner.

The client will need to click on the *Review and Sign form(s)* link.

The client must complete and sign all of the required form(s) before they are able to sign the policy contract.



This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

At the top of the page, a message bar will appear.

The client should check the box beside *"I agree to use electronic records and signatures"* and then click **CONTINUE**.



This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

When the client is ready to start the signing process, they must click the **START** button.

That will take them to the first spot in the document that needs to be signed.

Certain sections of the form(s) will be auto-populated.

Mandatory sections to be completed will be indicated in red.

Please review the documents below.

DocuSign Envelope ID: 96025639-06B2-4BA3-A4C1-9F7A772DB5ED

ivari™

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com 500-5000 Yonge Street
Toronto, ON M2N 7J8
ivari.ca

**Pre-Authorized Debit (PAD)
for Insurance Products**

1 Policy Information X

OWNER(S) ivari Policy Number(s): **ARLP54**

Last Name: **DEFERRAL** First Name: **MISSIE**

Last Name: First Name:

2 Payor Information **IF OTHER THAN OWNER**

☐ Mr. ☐ Mrs. ☐ Ms. ☐ Miss ☐ Other

Last Name: First Name: Initial(s):

Street Address: Apt./Suite:

City: Province: Postal Code:

Date of Birth (DD/MM/YYYY): Relationship to Owner(s):

Payor's Occupation: In what industry are you employed?*

If a Corporation, incorporation #: Place of registration:

*For a list of valid industries refer to <https://ivari.ca/tools-and-resources/administration/> and search for form number (IP-LP197).

3 PAD Withdrawal Information **PLEASE ATTACH PERSONALIZED PRE-PRINTED VOID CHEQUE**

Select one option:

☒ Establish a new PAD account (must attach preprinted void cheque or stamped bank letter)

☐ Use existing PAD account from ivari life policy no.: (void cheque not required)

The date of withdrawal will be the same as the policy effective date. If you wish a different withdrawal date, please indicate preferred date of withdrawal (days 1-28 only).

Effective Date – Begins on (1st to 28th of month): (DD/MM/YYYY) Total Amount \$

For universal life policies, if you select a withdrawal date that is after your policy date, we will automatically set the withdrawal date to match the policy date.

If the PAD date falls on a non-business day or statutory holiday, the PAD will be drawn on the next business day.

Frequency: ☐ Monthly ☐ Quarterly ☐ Semi-annually¹ ☐ Annually ¹may not be available on all plans

This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

If additional documents such as a pre-printed void cheque are required, the client must click on the paperclip icon to attach it.

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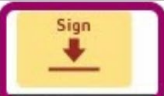
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This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

The client must click on the **Sign** button to start the signing process.



Sign here Date: 19/6/2020 | 09:14:28 EDT
(DD/MM/YYYY)

Signature of Owner

This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

Using their mouse, stylus or finger, the client must draw their 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 satisfied, the client should click **ADOPT AND SIGN**.

They will automatically be taken to the next spot in the document that requires signing.

Adopt Your Signature

DRAW

DRAW YOUR SIGNATURE Clear



I agree that this signature or initial is the electronic representation of my signature or initial for all purposes when I (or my agent) use them on documents, including legally binding contracts, just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

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 **FINISH**.

Done! Click Finish to send the completed document.

FINISH

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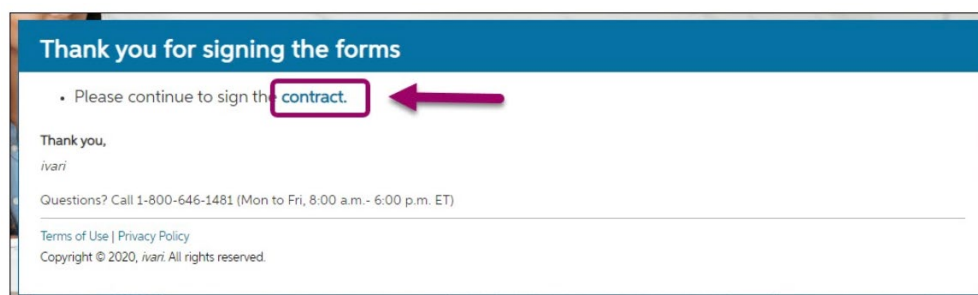
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IP-LP782 5/19 2 ivari.ca

This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

A confirmation page will appear.

The client can now proceed to the signing of the policy contract by clicking on **Contract**.

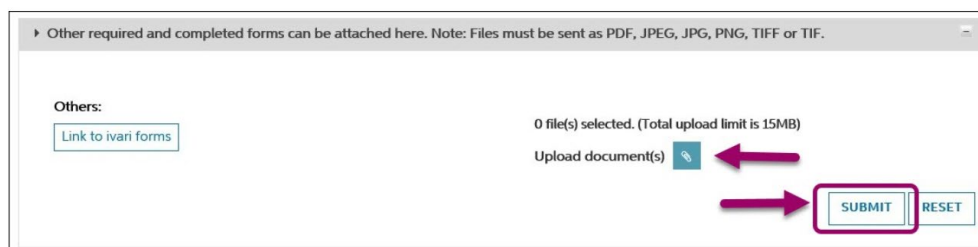
It will take a few seconds for the *Review and sign your policy contract* link to be activated.



This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

This will bring the client back to the **Policy contract review and signing** page.

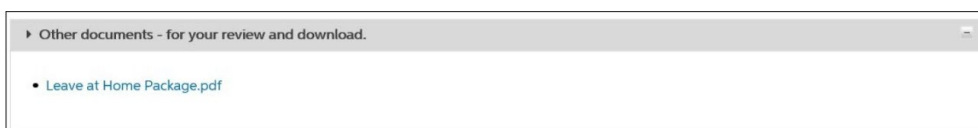
If the client has completed and signed any other required forms, they can use the paperclip icon to upload those forms here, and then click **SUBMIT**.



This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

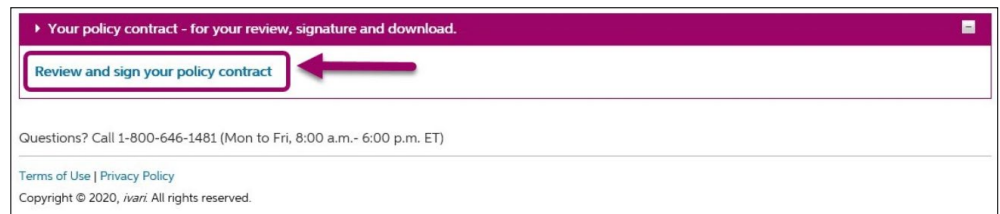
Any other documents or forms that you have uploaded for the client to review or complete will be available under the **Other documents – for your review and download** section.

The Leave at Home Package will always be included.




Next they should click the **Review and sign your policy contract** link.

For prosperity Simplified Issue and Guaranteed Issue policies, no signatures are required. The owner must simply click on the Review and download your policy contract link.



For prosperity Simplified Issue and Guaranteed Issue policies:



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At the top of the page, a message bar will appear. The client should check the box beside *"I agree to use electronic records and signatures"* and then click **CONTINUE**.

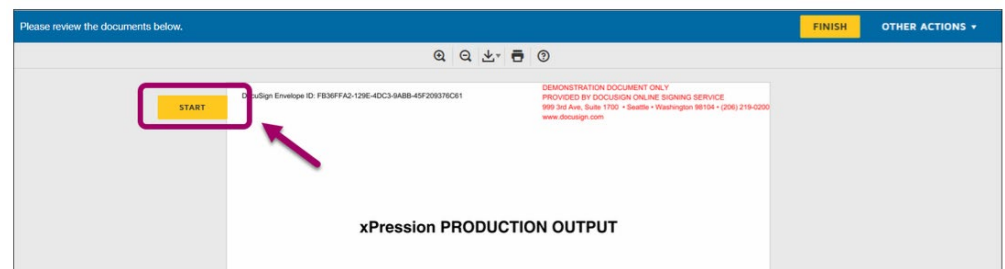
Note: Each page of the policy contract should be carefully reviewed by the client before they sign the Delivery Receipt and amendments, if any.



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When the client is ready to start the signing process, they must click the **START** button.

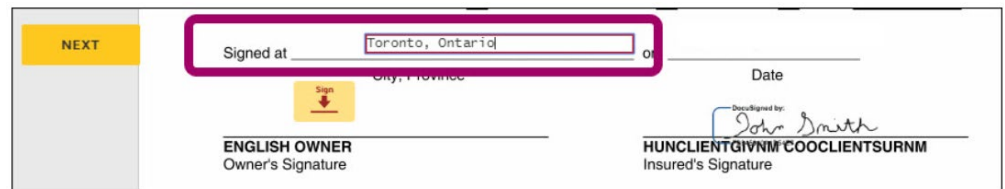
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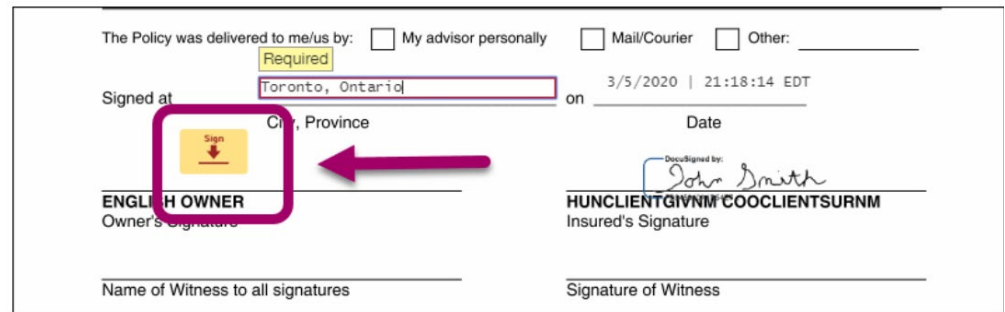
The client should click in the *Signed at* field to enter the city and province that the contract is being signed in.

The date and time field will auto-populate when the first owner has opened this document.



This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

The client must click on the **Sign** button to start the signing process as the owner.



This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.

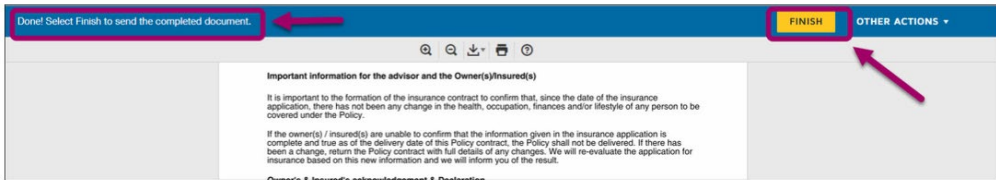
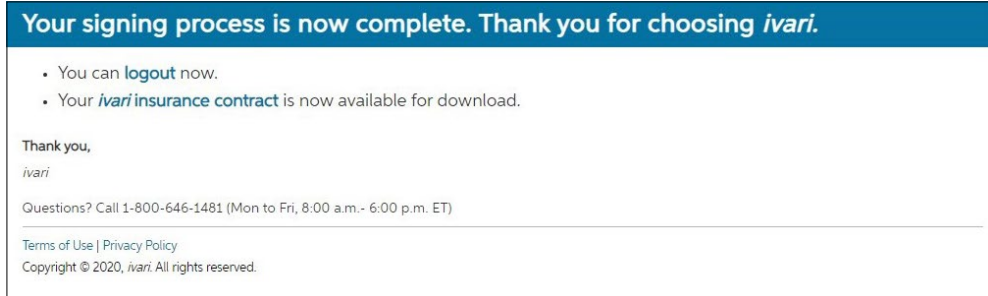
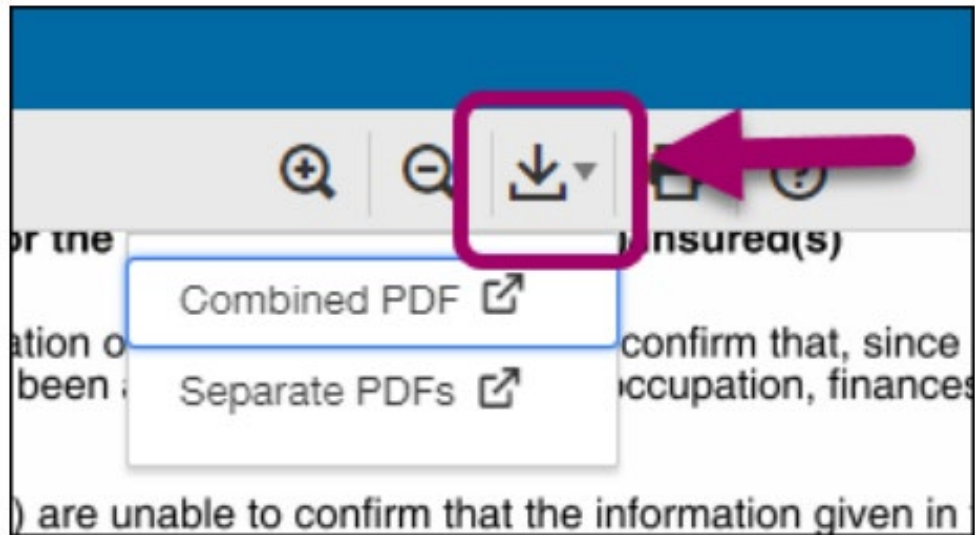
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The signature must be inside the box and must meet a minimum length requirement to be accepted by the system.

Once satisfied, the client should click **ADOPT AND SIGN**.

They will automatically be taken to the next spot in the document that requires signing.



<p>This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.</p> <p>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 FINISH.</p>	
<p>This section does not apply to prosperity Simplified Issue and Guaranteed Issue policies.</p> <p>A confirmation page will appear.</p>	
<p>The policy owner must download and save the policy contract to accept delivery before logging out.</p> <p>As the advisor, it is your responsibility to ensure that the client(s) has successfully downloaded their contract.</p>	

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