



Advisor review of policy contract and signing

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

Once a policy has been signed by both the insured and owner, you will receive an email from *ivari* (ePolicies@ivari.ca).

Click the **link** to proceed to the security confirmation process.

From: [ivari ePolicies<ePolicies@ivari.ca>](mailto:ePolicies@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



Hello Servicing Advisor,

Thank you for choosing ivari. Your client's ivari policy contract is ready for your review.

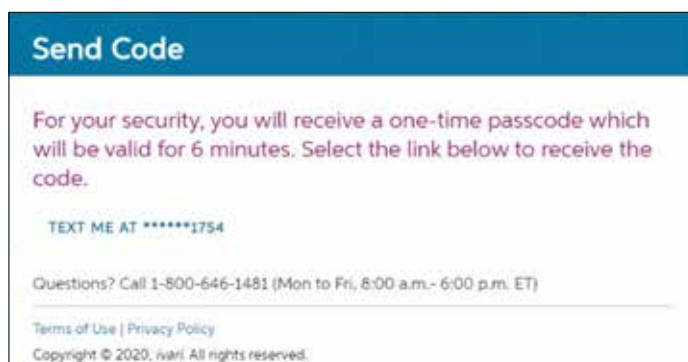
- To view and sign the contract, please use this [link](#) and follow the simple steps.
- When completing the required document(s), you will be guided to where you need to add information and sign.

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.

A new webpage will open. Click the “TEXT ME AT...” link to receive a security code.

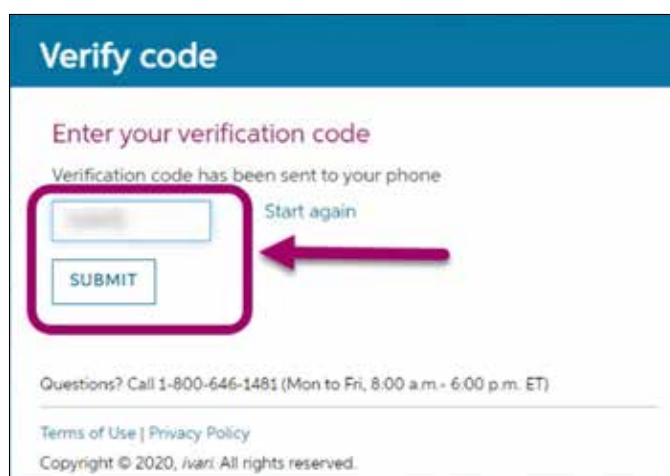
You should be near the device receiving the code as it will only be available for 6 minutes.



A new screen will appear. Enter the code from the text and click **SUBMIT**.

If you make a mistake, you can click **Start again** to receive a new code.

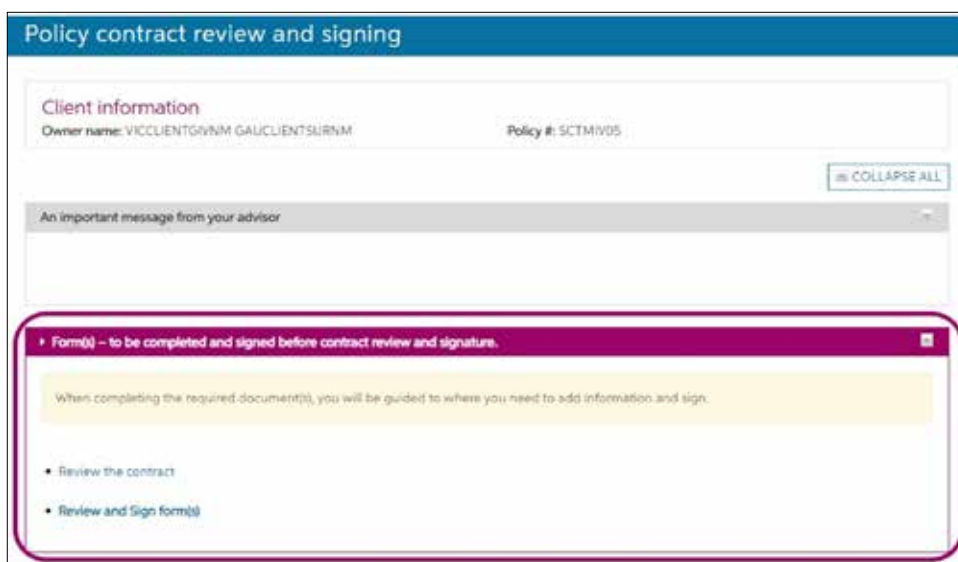
Note: You have a maximum of 5 tries to enter the passcode correctly. After that, you must wait for 5 minutes before you can request a new code.



Once you have entered the correct code, you will be directed to the **Policy contract review and signing** 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 *Delivery Requirements* section on the **Client information** page.



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|---|--|
| <p>Next, click the Review and sign your policy contract link.</p> | |
| <p>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 CONTINUE.</p> | |
| <p>Before signing, review the policy contract again to ensure it is in good order.</p> <p>Then, click the START button to be taken to the Contract Placement List for signing.</p> <p>Review the Contract Placement List carefully to ensure all delivery requirements have been sent back by the client(s).</p> | |
| <p>Click the Sign button to begin signing.</p> | <p style="text-align: center;">Advisor Report</p> <p>Instructions to Advisor:</p> <ul style="list-style-type: none"> • 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 Comments section to draw required premium(s), including all back premiums from client's bank account, if applicable. • If reissuing a policy specify the changes requested in the Comments section and submit together with any completed delivery requirements. • If a policy is not taken provide the reason why in the Comments section. <p>Instructions from Advisor:</p> <p>Comments:</p> <p>_____ _____ _____ _____ _____</p> <p>Advisor Signature: _____ Date Delivered: 4/2/2022 11:45:15 EST</p> <p>_____</p> |

| <p>Using your mouse, stylus or finger, draw your signature in the box.</p> <p>The signature must be inside the box and must meet a minimum length requirement to be accepted by the system.</p> <p>Once you are satisfied, click ADOPT AND SIGN.</p> | | | | | | | | | | | | | | | | | | | | | |
|---|---|---------------------|---------------|----------------------|---------------|----------------------|------------------|------------------|-------------------|------------------|-------------------|-----------|--|---------------|--------|-----------|--|------------|--|------------|------|
| <p>Once your signature has been applied, a message will appear giving you the option to enter a note to ivari. This is optional.</p> | | | | | | | | | | | | | | | | | | | | | |
| <p>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 FINISH.</p> | | | | | | | | | | | | | | | | | | | | | |
| <p>A confirmation page will appear.</p> | | | | | | | | | | | | | | | | | | | | | |
| <p>On the Policy Contracts page in webcappow, the <i>View contract</i> field will have a SIGNED button, and the <i>Release to client</i> field will have a VIEW button.</p> | <table border="1"> <thead> <tr> <th>Contract print date</th> <th>Policy #</th> <th>Owner name</th> <th>View contract</th> <th>End of delivery date</th> <th>Advice code</th> <th>Advice name</th> <th>Distributor code</th> <th>Distributor name</th> <th>Release to client</th> </tr> </thead> <tbody> <tr> <td>03MAY2020</td> <td></td> <td>ENGLISH OWNER</td> <td>SIGNED</td> <td>01JUL2020</td> <td></td> <td>Test Agent</td> <td></td> <td>Test Agent</td> <td>VIEW</td> </tr> </tbody> </table> | Contract print date | Policy # | Owner name | View contract | End of delivery date | Advice code | Advice name | Distributor code | Distributor name | Release to client | 03MAY2020 | | ENGLISH OWNER | SIGNED | 01JUL2020 | | Test Agent | | Test Agent | VIEW |
| Contract print date | Policy # | Owner name | View contract | End of delivery date | Advice code | Advice name | Distributor code | Distributor name | Release to client | | | | | | | | | | | | |
| 03MAY2020 | | ENGLISH OWNER | SIGNED | 01JUL2020 | | Test Agent | | Test Agent | VIEW | | | | | | | | | | | | |

Click the **VIEW** button in the *Release to client* field to be taken to the *Contract release information* page.

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).

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.

Client Information

For security and privacy reasons - please verify all email addresses and phone numbers before releasing the contract to the client(s). If you have sent a contract in error to a wrong or incorrect email address/phone number, contact our eBusiness Team.

* Mandatory fields

| Name (Relationship) | Email address | Cell phone | Notification sent date | Contract signed date | Action | Email notification |
|--|---------------|------------|------------------------|-----------------------|--------|--------------------|
| MESSE DEFERRAL (Owner/Insured) | [REDACTED] | [REDACTED] | 20-06-2020 10:48:19 PM | 21-06-2020 1:02:16 AM | EDIT | RESEND |
| Melissa ServAdv Modeltestact (Advisor) | [REDACTED] | [REDACTED] | 21-06-2020 1:10:33 AM | 21-06-2020 1:14:50 AM | EDIT | RESEND |

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