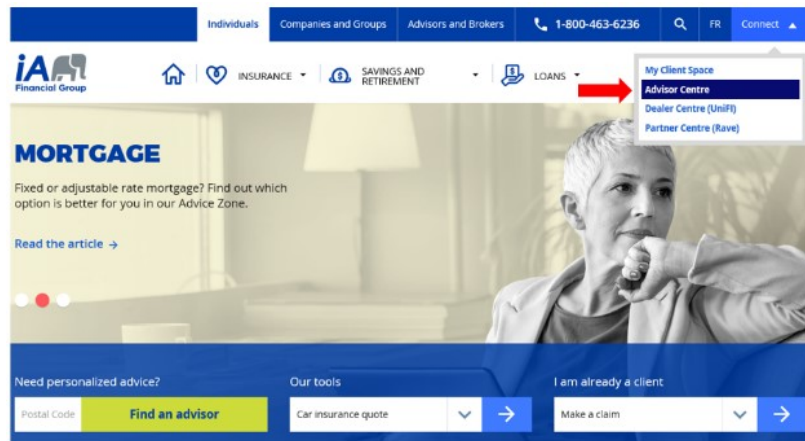




Are You A First Time EVO User?

- 1) An **Advisor Centre** Secure Access Code and Password is *required* in order to complete any EVO electronic applications.
- 2) To create your Secure Access code, go to ia.ca, click **Connect** in the top right hand side, then click [Advisor Centre](#)



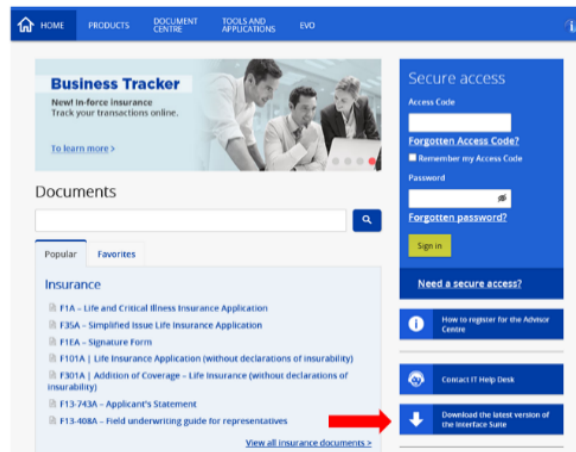
- 3) Click “**Need a secure access?**” and proceed to register, filling in all of the required fields:

A screenshot of the 'Secure access' registration form. The form has a blue background. It contains the following fields and elements: 'Access Code' with a text input field and a 'Forgotten Access Code?' link; a checkbox labeled 'Remember my Access Code'; 'Password' with a text input field and a 'Forgotten password?' link; a yellow 'Sign in' button; and a red arrow pointing to a 'Need a secure access?' link at the bottom.

- if your contracting was completed as a Corporation, you will need to contact IT directly to register.
- if you're not a corporation and it still rejects your registration, try including your middle name or other variations, as your Advisor Centre registration must match exactly how you contracted with iA Financial Group

If you are still having trouble registering for access, or need technical help during any stage of the process, please call our Help Desk at 1 (888) 610-5101 and have your iA Advisor Code ready for the call.

4) Download the *Interface Suite* software from the Advisor Centre.



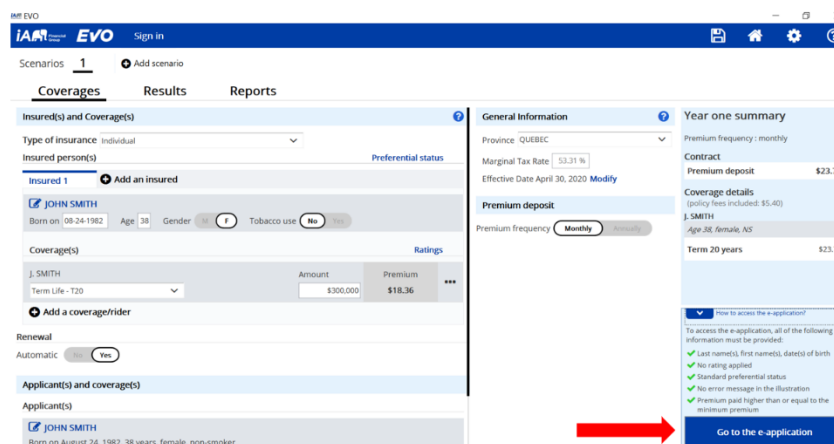
5) Once downloaded, here is how it will appear as an IA icon on your desktop.



6) Open the Interface Suite and click on **Insurance** near the top left

7) Launch EVO, select the appropriate product and run a quote

8) When your quote is structured to your liking, launch into the EVO Electronic Application in the bottom right hand corner



9) EVO will prompt you to create an EVO Password.

Tip: Use the same password as your Advisor Centre password

10) Once in EVO, there is a settings wheel in the top right hand side of the Page. You will go into it twice.

- Click **Advisor** and add yourself to avoid having to do this step every time you submit an application
enter your iA Code, name and cellphone number, and fill in commission as 100%, yes to after-sales service
- Click **Signature** and activate the use of the Electronic Signature

11) Here are also some [helpful videos](#), on the EVO application process.

12) Important to mention is that there are instances where electronic signature will *not be available* (currently replacement and corporate ownership are examples). In such cases, the EVO system will prompt you to do a paper signature instead (F1EA Signature Form, found in the Advisor Centre – Document Centre). You will be prompted to enter the unique ID on the form into the EVO application. Again, this is only in certain cases and this form can be emailed separately to your MGA once you’ve transmitted the electronic application.

iA does not require originals of any form and accepts scanned pdf copies. Electronic signature platforms such as DocuSign, Adobe Sign, One span are also acceptable on all forms

Policy Delivery – once a policy is approved and issued, it will be posted to Business Tracker on Advisor Centre within 48 hours along with any other requirements for delivery such as amendments (if applicable). Clients will be able to access a pdf copy of their policy at [My Client Space](#):

Questions? Please contact your Marketing Associate