

E-signature | Best practices

- \geq You must use EVO Experience driven to submit our transactions. If e-signature or the transaction is not available, please read the following.
- \geq For savings transactions using *Fundserv*, the existing agreements and criteria remain unchanged.

iA Financial Group has identified the following e-signature tools to be used when e-signature is not available with EVO:

- OneSpan click here to download •
- DocuSign click here to download •
- AdobeSign click here to download •
- FormStack - click here to download

Beneficiary change (insurance and savings) and medical authorization

- images below). Otherwise, the request will be returned unprocessed. FormStack **One Span** AdobeSign DocuSign Instruct the client to select the The handwritten signature Make it clear to the client that the Instruct the client to select the draw signature option. process must be selected when handwritten signature must be handwritten signature option. To creating. respected. do so, they must create a free account. eo 2' Field Placement rac fields for each participant onto the documen FIELD SETTINGS 🛔 Jane Doe ~ Standard Fields SZ450Tt1xK8Y Signature Fields Signature Alec Initials 🛗 Date ∧ Settings 5 Signature A Text Checkbox O Radio Signature A Full Na Field Name DS Initial Initials Clear All Fields Q john doe L Stamp Signature Block nature Type 📋 Date Signed apture sign < Back > Next Stamp Expected result Expected result **Expected result Expected result** Signature: DocuSigned by: on 2020-04-20118-01-96 SUR E-mail: boivinfrank@gmail.com In Loe E7CEB11054A74AB.
- Use one of the authorized e-signature tools above and select the Handwritten Signature option (see the

⇒ Other transactions

• The "click to sign" functionality is accepted.

Expected result	Expected result	
E-SIGNED by Jane Doe on 2020-04-01 12:40:49 EDT	X Mario Tardi 920593203E25483	iF

⇒ 3 eligibility criteria – E-signature

Important - Without this information, the request will be returned unprocessed.

- 1- A **password** (transmitted by email) or an **access code** (transmitted by SMS) must be transmitted to the client to allow him/her to sign in securely.
- 2- The e-signature process summary must be transmitted to iA Financial Group with the electronically signed document. In addition, **it must confirm the first eligibility criterion**, i.e. the use of a password or access code (see Appendix).
- 3- Display of a secure signature confirmation (See red squares in the examples below).

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Certified by Adobe Sign, a Document C	Cloud solution <adobe-sign-certified@adobe.com>, prod-hsm, certificate issued by Adobe CDS CA.</adobe-sign-certified@adobe.com>	Signature Panel

Appendix – OneSpan

How to attach your summary of the electronic signature process with the signed documents

- From the Transactions tab on your home page, download the documents using the 2 download buttons. As it is not possible to attach them, send us the documents in different PDF files :
 - 1. To download the signed documents (see red square 1 in the image)
 - 2. To download the summary of the electronic signature process (see red square 2 in the image)



Example of an overview of the electronic signature process

ID: Name: Created: Completed:	Γ	eMivaVS5FomxyBg99G7H0tO8xYY=	hn Doe View	Electron	res and				xample of
Summary document general	ited:	2020-Apr-28 14:34:30 (GMTZ) GMT Jo	hn Doe Accept	Signatur Consent Electron		mual:		50	ending by
Sender:			Accept	Disclosu	res and 9162	52er-1d92-			SMS
Name:		Audit Trail:				_			
accp_ri_sn@ia.ca		Date and Time	Rec	pient	Action	Document	IP		Other
Documents: Electronic Disclosures and Si F17E-1	Signatures Consent	2020-Apr-28 14:34:11 (GMTZ)	GMT John	Doe	Sent SMS	N/A	207.134.1	02.10	Phone Number: 1418
	and the second se	2020-Apr-28 14:34:24 (GMTZ)	61/1T	D	SMS	N/A	207.134.1	00.10	
OneSpan Sign Electronic Evi	idence Summary	2020-Apr-28 14:34:24 (GMT2)	GMT John	Doe	Authentication	17/0	201110411	102.10	
Recipients:	idence Summary	2020-Apr-28 14:34:24 (GMT2)	GMT John	Doe		170	20110412	102.10	
	idence Summary	2020-Apr-28 14:34:24 (GMT2)	GMT John	Doe	Authentication	170	1011104.1	102.10	
Recipients: Name:	idence Summary	2020-APF-28 14:34:24 (GM12)	GMT John	Doe	Authentication	170	1011104.1	.02.10	
Recipients: Name: Email:	idence Summary	2020-Apr-28 14:34:24 (GM12)	GMT John	Doe		N/2	201120112	102.10	
Recipients: Name: Email: Role: ID: Name:	idence Summary	2020-Apr-28 14:34:24 (GM12)	GMI John	Doe	Authentication	N/A	101120112	.02.10	
Recipients: Name: Email: Role: ID: Name: Email:	idence Summary				Authentication			.02.10	
Recipients: Name: Email: Role: ID: Name: Email: Role:	idence Summary	Date and Time		ipient	Authentication	Document	IP	.02.10	Other
Recipients: Name: Email: Role: ID: Name: Email: Role: ID:		Date and Time	Rec	ipient	Authentication OR Action	Document	IP		Other
Recipients: Name: Email: Role: ID: Name: Email: Role:			Rec		Authentication				Other
Recipients: Name: Email: Role: ID: Email: Role: ID: Electronic Disclosures and Si F17E-1		Date and Time	Rec	ipient	Authentication OR Action	Document	IP		Other
Recipients: Name: Email: Role: ID: Name: Email: Role: ID: Electronic Disclosures and Si F17E-1 Audit Trail:	ignatures Consent	Date and Time	Rec	ipient	Authentication OR Action Question And Answer	Document	IP		Other
Recipients: Name: Email: Role: ID: Name: Email: Role: Electronic Disclosures and Si F17E-1 Audit Trail: Date and Time	ignatures Consent	Date and Time	Rec	ipient	Authentication OR Action Question And	Document	IP	102.10	
Recipients: Name: Email: Role: ID: Name: Email: Role: Electronic Disclosures and Si F17E-1 Audit Trail: Date and Time 2020-Apr-29 143411 (GMT2) GMT	ignatures Consent	Date and Time	Rec	ipient	Authentication OR Action Question And Answer	Document	IP	102.10	Other
Recipients: Name: Email: Role: ID: Name: Email: Role: Electronic Disclosures and Si F17E-1 Audit Trail: Date and Time	ignatures Consent	Date and Time	Rec	ipient	Authentication OR Action Question And Answer	Document	IP	102.10 Exa	

Appendix – DocuSign

How to attach your summary of the electronic signature process with the signed documents

- 1- From your home page, click on the Admin tab, then on Signing Settings (in the left pane).
- 2- **The first time only**: In the Envelope Delivery section, click on the option Attach certificate of completion to envelope (See red square 1st image).
- 3- Each time: When downloading the document, select the option Combine all PDFs into one file. This way, your summary of the electronic signature process will be attached to the signed document (See red square 2nd image).

Envelope Delivery
Attach documents to completion email
Attach certificate of completion to envelope
DOWNLOAD
Select which files you want to download:
I All 2 files
Socument 1 PDF
Certificate of Completion 1 PDF
Combine all PDFs into one file
Da
DOWNLOAD CANCEL

Example of an overview of the electronic signature process

Certificate Of Completion Envelope Id: 2E395DF5E72F455E80E2t Subject: Veulles signer avec DocuSign : Source Envelope: Document Pages: 4 Certificate Pages: 4		Status: Completed	Confirmation - Password transmitted to the client to allow him/her to sign securely.
AutoNav: Enabled Envelopeld Stamping: Enabled Time Zone: (UTC-08:00) Pacific Time (U	S & Canada)	IP Address: 207.134.102.10	
Record Tracking Status: Original 5/6/2020 9:15:19 AM	Holder: Francois Boivin	Location. DocuSign	
Signer Events John Doe Security Level: Email, Account Auther	Signer Even	ts	Signature
(None), Access Code	John Doe		DocuSigned by:
Electronic Record and Signature D Accepted: 5/6/2020 9:17:40 AM ID: 83ff5c0e-afb1-45ba-bacc-8438	@gm	ail.com	Shu Lee
In Person Signer Events Editor Delivery Events Agent Delivery Events	Security Level: E (None), Access	Email, Account Authentica Code	cation
Intermediary Delivery Events	Status	Timestamp	
Certified Delivery Events	Status	Timestamp	
Carbon Copy Events	Status	Timestamp	
Witness Events	Signature	Timestamp	
Notary Events	Signature	Timestamp	
Envelope Summary Events Envelope Sent Certified Delvered Signing Complete Complete Payment Events Electronic Record and Signatu	Status Hashed/Encrypted Security Checked Security Checked Security Checked Status re Disclosure	Timestamps 5692020 9 16 50 AM 5692020 9 17:40 AM 5772020 5 12:44 AM 5772020 5 12:44 AM Timestamps	

Appendix – AdobeSign

How to attach your summary of the electronic signature process with the signed documents

- 1- From your home page, click on the Account tab, then on Global Settings in the left pane.
- 2- In the Attach audit report to documents option, click on Attach current audit report to documents when downloaded from the Manage page (See red square in the image).

Atta	ch audit report to documents
Wh	en sending the final "Signed Document" email, the audit report should be attached:
0	Never 🛛
0	For Sender Only
۲	Always
	Attach current audit report to documents when downloaded from the Manage page

Example of an overview of the electronic signature process

Created: By: Status:	2020-05-08 Francois Bolvin (1999) @la.ca)		
	Francois Boivin (1997) @ia.ca)		
Otatua			
Status:	Signed		
Transaction ID:	CBJCHBCAABAA5_75MMQvNVjp2wHB4_QSZATCX-Vfv_gk		
 Email viewed b 2020-05-08 - 7:37: John Doe 2020-05-08 - 7:37: 	35 PM GMT- IP address: 66.102.8.98 @gmail.com) entered valid password.	Example of sending by email	Confirma Passwoi
			Access c
lahu Dag mari	OR	sing the share number of VAA	transmitt the clien
John Doe	OR @gmail.com) verified identity with phone authentication us	sing the phone number +X XXX	transmitt the clier

(Password send by email or access code by SMS)

Appendix – FormStack

How to attach your summary of the electronic signature process with the signed documents

No action is required because the summary of the electronic signature process is automatically attached to the signed documents.

Example of an overview of the electronic signature process

Document Reference : c18fdd14-fe1f-433 Document Title : test1 Document Region : Northern Virginia Sender Name : François Boivin Sender Email : @gmail Total Document Pages : 4 Secondary Security : Required Participants			
1. Jane Doe (entropy @ia.ca))		
Dc	ocument History		
Timestamp	Description		
05/11/2020 13:20PM UTC	Document sent by François Boivin		
05/11/2020 13:20PM UTC	Email sent to François Boivin (esta de la com agnail.com).		
05/11/2020 13:20PM UTC	Email sent to Jane Doe (@ia.ca).		
05/11/2020 13:20PM UTC	Jane Doe (example 1 @ia.ca) entered an invalid password. 207 134 102 10		
05/11/2020 13:21PM UTC	Jane Doe (Part Second Gia.ca) entered a valid pagsword. 207.134.102.10		
05/11.0020 13:21PM UTC	Document viewed by Jane Doe (@ia.ca). 207.134.102.10 Mozilla/5.0 (Windows NT 10.0; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/78.0.3904.97 Safari/537.36		
05/11/2020 13:21PM UTC	Jane Doe (@ia.ca) has agreed to terms		
Confirmation - ord transmitted to the client to allow him/her to sign securely.	of service and to do business electronically with François Boivin (ggmail.com). 207.134.102.10 Mozilla/5.0 (Windows NT 10.0; WOW64) AppleWebKit/537.36 (KHTWL, like Gecko) Chrome/78.0.3904.97 Safari/537.36		
05/11/2020 13:21PM UTC	Signed by Jane Doe (Signed). 207.134.102.10 Mozilla/5.0 (Windows NT 10.0; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/78.0.3904.97 Safari/537.36 Document copy sent to Jane Doe (Sia.ca).		