

# YOUR REMOTE SELLING PROCESS

## Product offer and adaptation



In our current situation, it may be necessary to adapt in order to serve your clients. Here is a summary to help you figure out how:

### BUSINESS AS USUAL... OR ALMOST!

**New sales with EVO / RESP application / Assure&Go**

<b>Insurance :</b> <ul style="list-style-type: none"><li>▶ Term traditional and whole life insurance (maximum face amount of \$5M)</li><li>▶ Critical illness insurance (maximum face amount of \$2.5M)</li><li>▶ Access Life</li><li>▶ Disability insurance, Superior Program, universal loan insurance, Cancer Guard, Acci 7 Plus and Acci-Jet</li><li>▶ Universal life insurance</li></ul>	<b>Savings :</b> <ul style="list-style-type: none"><li>▶ RRSP</li><li>▶ TFSA</li><li>▶ RESP</li><li>▶ Non-registered</li></ul>
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**How do I adapt?**  
Use **video-conferencing** for identity validation

Take advantage of **underwriting adjustments** to offer simplified processes for even more clients!

### A BIT MORE ADJUSTMENT REQUIRED

**Non-EVO transactions / RESP application / Assure&Go**

For **non-EVO transactions** and **RESP applications requiring a signature** (e.g. F1EA), complete an electronic transaction from start to finish.

Whether for an electronic change or a conversion, for example, use an **approved paperless signature tool**.

**Screen-sharing** is **MANDATORY** for Assure&Go and non-EVO signature forms (e.g. F1EA, F17EA, etc.)

➔

**Signature**

**How do I adapt?**  
Use an approved **electronic signature tool**.

**Protecting documents**

**How do I adapt?**  
Use a **secure exchange tool**

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**iA Campus → Distance selling (available for the Career network)**  
[covid-advisor.ia.ca](https://covid-advisor.ia.ca)