

We're here to help and make it easier to do non face-to-face business with us.

We take the health and safety of our valued employees, advisors, applicants and policyholders seriously and we are continuing to monitor the COVID-19 situation closely. Our solution to process non face-to-face business and eDelivery of contracts will be launched Monday. At this time, we encourage you to only use video conference calling technology (Skype, FaceTime, Zoom etc.) to maintain contact with your clients.

*Process for working with new clients:*

#### What you need to know

- For UL policies, *ivari* will use Equifax to verify the client's identity – this process will not affect your client's credit rating
- *ivari* reminds you to not store a client's personal information on an unprotected device or system
- Once the application is approved, *ivari* will upload the policy contract to webcappow
- Once the premium is paid and all delivery requirements are received by *ivari*, your client will be covered

Please continue to perform your needs-based market conduct duties while we work to provide a seamless experience for everyone. We will continue to refine this process and contact you if we require additional information to settle the policy.

### eDelivery of policy contracts

In keeping with the non face-to-face process, effective Monday, March 30<sup>th</sup>, 2020, your client's policy contract will generate and be available for download in webcappow. Once the policy contract is ready to be downloaded, you will be notified via your regular daily consolidated eNotification.

**Be prepared!** Make sure you're registered on ivari.ca to receive these eNotifications. If you need assistance, reach out to your Sales Director.

**Heads up Distributors!** You will receive a new daily email notification when there are policy contracts ready to be downloaded.

*Stay tuned for more details about the eDelivery process on Monday!*

If you have any questions about this process, as always, your sales team is here to help!