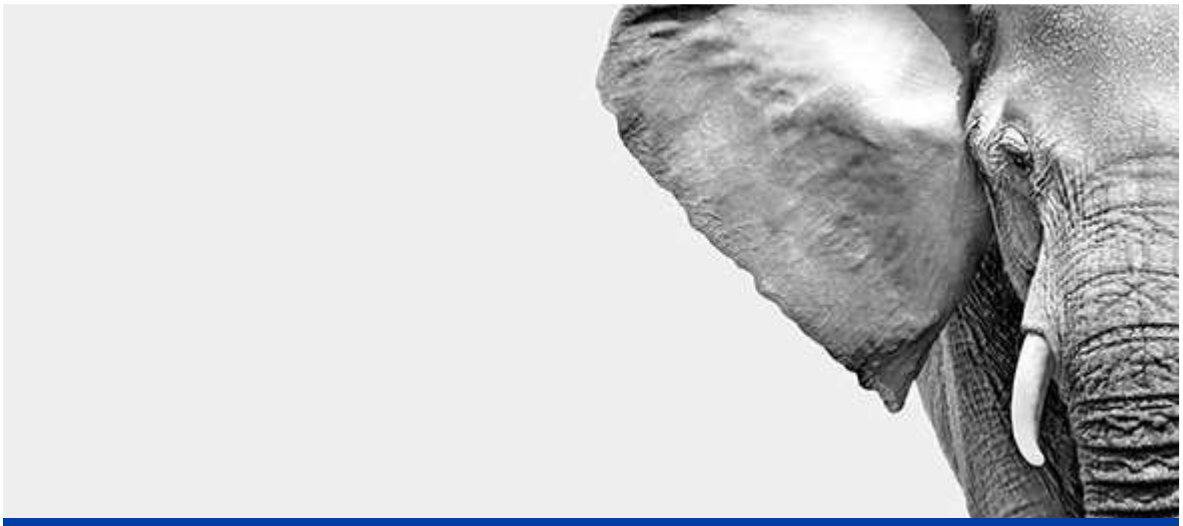
Financial Group



INDIVIDUAL INSURANCE, SAVINGS AND RETIREMENT |
Contract Administration and Compensation

At iA Financial Group, we are fully aware of and closely monitoring the special situation and rising concern over COVID-19.

As an employer of choice and corporate citizen, iA Financial Group is duty-bound to ensure the health and safety of its employees, clients and partners. Therefore, rest assured that we are taking all necessary measures, thanks to our secure IT structure and technology, to ensure the continuity of our operations and the usual quality service you expect from us.

Adaptive measures to cope with COVID-19

- To limit cheque payments, please encourage your clients to make their payments through their banking institution* or contact our customer service to activate pre-authorized debits.
- All mail destined to agencies has been temporarily halted. To keep track of your transactions as well as all documents intended for your clients, we invite you to consult our electronic tools, including Business Tracker and all other tools available in the Advisor Centre.
- Make use of our available electronic tools, especially:
    - EVO Insurance for electronic changes (F1E form for paper);
    - EVO Savings for deposits, contributions, applications and interfund transfers for available products;
    - Online claims for all death, critical illness and disability claims as well as secure electronic document sharing;
    - Rest assured, that we still have the capacity to accept and process applications received in hard copy.
- We will, starting now, use direct deposits rather than cheques whenever possible. Exceptionally issued cheques will be sent out to clients without letters or confirmations.

Specific to Insurance

- Printing of contracts following a modification is suspended, as for new issues. You can see the progress of the modification in Business Tracker and the client can consult the information in the Client Space. More instructions will follow regarding the contracts;
- To protect you and your clients, death and critical illness claim cheques will be sent directly to either the beneficiary or the client. Please consult Business Tracker to provide your clients with the necessary support during their claim. Disability benefits will also be paid by direct deposit, where possible.

Specific to Savings

- When electronic transmission is not possible, please send us needed documents or forms by fax at 1-855-685-5161. Originals are not necessary.
- All transactions will be available in My Client Space, thus giving clients easy access to track them. Consequently, mail correspondence will be put on temporary hold.
- You can access various information lists in the *Obtain client investment information* section at the bottom of My Clients page in the Advisor Centre.

Specific to Compensation of Distribution Networks

- For compensation-related questions, please contact us by email at remuneration.agents@ia.ca, and for questions related to contracting at contratdagent@ia.ca. You can also reach us You can also contact us at our regular phone number at any time. We will get back to you at the earliest convenient time. However, in this case, email replies and returning phone calls might take longer than usual.
- All documents related to contract administration will be sent to you by email.

In closing, do not hesitate to contact us for any questions concerning your clients' contracts with iA Financial Group. We are committed to supporting you.

We will continue to closely monitor the situation and will keep you informed of any developments.

Thank you for your continued trust.

Renée Laflamme
Executive Vice-president
Individual Insurance, Savings and Retirement

***Client instructions to make payments via online banking**

1. Go to the online banking website of your financial institution.
2. Add « Industrial Alliance Insurance and Financial Services Inc to your list of payees.
3. Indicate the reference number and follow the related instructions:
   - For insurance contracts: « VI » + « contract number »
   - For savings contracts: « RI » + « contract number »
4. Choose the desired amount and proceed to transfer.

Please allow up to three (3) business days for your transaction to be processed.
It is currently not possible to use this method of payment for Superior Program, Acci-Jet Program, Universal Loan Insurance and Accifamily.

INVESTED IN YOU. **ia.ca**

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