SAVINGS | Tailored processes for non-face-to-face business deals

Hello,

As previously mentioned in the Individual Savings and Retirement email, *Your tools for effective business continuity,* sent on March 19, we have sought to find the most effective and secure means to facilitate non-face-to-face business with your clients.

We are pleased today to present you with the findings of our research and to provide two high-performance platforms, Zoom and Skype, to conduct your meetings remotely while allowing client identity verification and document sharing.

You will find below the sales procedure for our registered savings products (TFSA, RRSP and RESP). We are also developing a solution to allow non-face-to-face sale of non-registered savings plans while staying in compliance with the standards and best practices governing our industry. We will share more news on that in the next few days.

Adaptive procedures for exceptional circumstances

Verify client's identity	**New clients:** You must verify your client's identity via videoconference (Skype or Zoom). The client must present an identity card during the video call and not via email or a text message. **Existing clients:** Videoconference is recommended.
Provide documents	Sharing documents can be done through screen sharing (Skype or Zoom). Note that document sharing via email is prohibited due to the risk of personal data breach.
Complete an application, make a contribution or make an interfund transfer	EVO* is always available and preferable to use. Throughout the confirmation step, you can view your request before submission.
Sign the application	EVO includes the electronic signature feature which facilitates non-face-to-face transactions. All the client needs is a valid email or cell phone number. Signed documents will be available minutes after the confirmation step under Transaction follow-up – *Individual Savings and Retirement* in the Advisor Centre.
Confirm transaction	Transactions will be available in My Client Space.

*Quick tips are available on EVO Savings to help fill out required fields.

Warning! *Selling non-registered savings products requires in-person identity verification. We are in the process of finding a solution to allow non-face-to-face sales in that respect while staying in compliance with standards and best practices of our industry. We will get back to you on that in the coming few days. Interfund transfer are eligible only if the client has signed a Limited trade authorization.*

Attached to this email is a Guide to Good Practice to facilitate the proper use of these platforms.

Rest assured that during this extraordinary period, our service team remains operational and ready to provide the service you deserve. We can receive and process all your insurance requests. As the situation is evolving rapidly, we will continue to keep you informed of any developments.

Stay up-to-date on latest developments

We invite you to refer your clients to our corporate site ia.ca to view the latest iA Financial Group measures with respect to COVID-19.

We are all invested in you.

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

INVESTED IN YOU. **ia.ca**

Industrial Alliance Insurance and Financial Services Inc., 1080 Grande Allee West, PO Box 1907, Station Terminus, Quebec City, Quebec G1K 7M3 (Canada) To stop receiving commercial electronic messages from Industrial Alliance, Insurance and Financial Services Inc., click here.