

Procedures for Electronic Documentation

With everyone practicing physical distancing during the COVID-19 pandemic, we have temporarily retooled our processes to better serve you – and your clients.

Obtaining Remote Signatures

The most straightforward path for collecting e-signatures is through an approved electronic platform, such as:

- OneSpan (formerly eSignLive)
- DocuSign
- iGenyPro
- Adobe

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* Gary Chalmers Initials* GC

SELECT STYLE DRAW UPLOAD

PREVIEW Change Style

DocuSigned by: Gary Chalmers DS DFD21DC67BF1455...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

Should your client be unwilling/unable to provide an e-signature, confirm their email address and willingness to transact electronically. After you send the document by email, co-ordinate return of a signed copy through scanner, photo or written attestation. Finally, forward the document to BMO Insurance via your Transport Layer Security (TLS) approved MGA/Dealer and safely store all communications for seven years.

Electronic Transmission of Applications

- 1 Access BMO [GIF Investor Kit & Point of Sale Material](#)
- 2 Send the Information Folder & Policy Provisions and Fund Facts PDFs to the client before receiving signatures
- 3 Submit applications and supporting documents via your TLS approved MGA/Dealer by email: documents.bmolifegif@bmo.com or by fax: 1-855-747-5613.

Electronic Transmission of Administrative Documents

Other documents not related to applications can be submitted via your TLS approved partner by email: documents.bmolifegif@bmo.com or by fax: 1-855-747-5613.

Remote Identity Verification

Where verification of identity is required and you cannot meet the client face-to-face, dual process verification can be used by completing [form 798E](#). This ensures AML compliance (for example, in lieu of section 14 (1) of the GIF client-name application, a face-to-face verification).

Have other questions?

Please visit bmo.com/insurance/advisor/covid-19/

Important: For changes in beneficiary or ownership, power of attorney or limited trading authorization, we require the original document with a wet signature. These documents are NOT eligible for remote signatures.

Let's connect

To find out more about BMO Insurance products, please call your MGA, contact the BMO Insurance regional sales office in your area, or call 1-877-742-5244 or email ClientServices.BMOLifeGIF@bmo.com



Ontario Region
1-800-608-7303

Quebec – Atlantic Region
1-866-217-0514

Western Region
1-877-877-1272



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