

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, call 1-855-639-3867 or email ClientServices.BMOLifeGIF@bmo.com.

BMO Life Assurance Company, 60 Yonge Street, Toronto, ON M5E 1H5

Ontario Region	Quebec – Atlantic Region	Western Region
1-800-608-7303	1-866-217-0514	1-877-877-1272

bmoinsurance.com/advisor



We're here to help.™

Insurer: BMO Life Assurance Company

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