How to eSign your BMO Insurance Application or Contract Package

Thank you for choosing BMO Insurance. Your advisor will electronically deliver your application or contract package when it is ready for your eSignature. You will be required to sign the application or confirm acceptance of your policy through the eSign process.

This document provides you with instructions and tips on how to use our eSign process.

eSignature

To assist you, we have a few important notes on the eSignature process:

Video: How to Electronically Sign a Document with OneSpan[1]

You will receive an email from OneSpan with a link to review and eSign the documents. Clicking on the 'Go to Documents' link in the email will open the OneSpan portal where you will need to enter the authentication code sent to your mobile phone number via SMS. This is a different passcode than what you may have used to eSign your insurance application.

Complete the process as follows:

For mobile devices, tablets, or touch-screen laptops:

1. Review and accept the eSign Disclosure document.

2. Review the application or policy contract and ensure that all information is correct.

    For policy delivery

If you are an insured party on the policy, you will also see your confidential client disclosures and should review those for accuracy, as well.

*   *On the Policy Delivery Receipt and Declaration of Insurability document, insured parties must confirm their smoking status, provide details of any change in health or insurability (if applicable), and select the province of signing before applying an eSignature.*

3. Tap on the 1st signature box and sign directly on the device with your finger or a stylus.

4. You can click on the subsequent signature boxes, one at a time, to apply your captured signature to the rest of the contract package.

5. Once all signatures are provided, the eSign package will be sealed and cannot be modified.

6. Exit the signing screen.

7. When everything is complete, all parties will receive an email reminder to download their own copy of the signed documents.

BMO Insurance

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For laptops without touch-screen capability:

1. Review and accept the eSign Disclosure document.

2. Review the documents and ensure that all information is correct.

   For policy delivery
   If you are an insured party on the policy, you will also see your confidential client disclosures and should review those for accuracy, as well.

   - *On the Policy Delivery Receipt and Declaration of Insurability document, insured parties must confirm their smoking status, provide details of any change in health or insurability (if applicable), and select the province of signing before applying an eSignature.*

3. Click on the 'Next' button to navigate to the fields you need to complete and select the 'Sign' button to apply an eSignature:

   - *Use a **mouse** to draw your signature;*

4. You can click on the subsequent signature boxes, one at a time, to apply your captured signature to the rest of the contract package.

5. You can also see the eSign status of and navigate between all the documents in the package by using the navigation pane on the left hand side of the screen.

6. Once all signatures are provided, the eSign package will be sealed and cannot be changed.

7. Exit the signing screen.

8. When everything is complete, all parties will receive an email reminder to download their own copy of the signed documents.

Download a copy of the signed documents

- Once the eSignature process is successfully completed, you will receive an email from OneSpan with a link to download your documents, using a one-time passcode sent to your mobile device.
- Be sure to store a copy of your documents in a secure place.
- Access to the signed documents will expire in 90 days. To obtain a copy of the policy after 90 days, please contact your insurance advisor.

? Need help?

Your insurance advisor can answer your questions and provide assistance.

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