

SmartDelivery™

Working with Licensed Assistants

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If you are an advisor who has designated life insurance licensed assistants, you can give these individuals access to a SmartDelivery package so that they can help with the eDelivery process.

Licensed Assistants, when assigned to a policy, can:

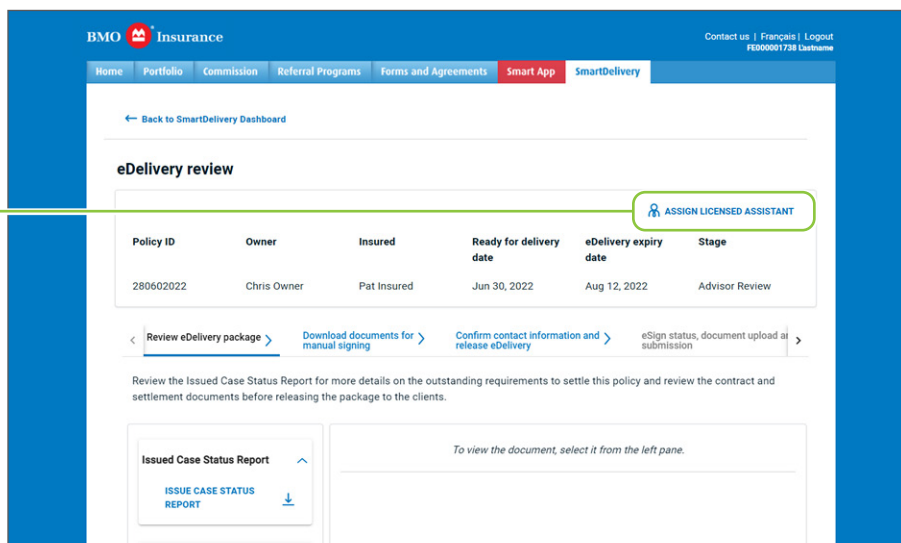
- view the policy on their SmartDelivery dashboard
- view the policy details and perform all aspects of the **online eDelivery** process, except for eSigning the eDelivery documents.
- initiate the **offline delivery** process to obtain signatures, *if required*.

Assigning a Licensed Assistant to eDeliver a Policy

A licensed assistant can be designated to help perform eDelivery using the 'ASSIGN LICENSED ASSISTANT' function on the eDelivery Review screen.

Select the assistant from the list of associated Licensed Assistants and click 'CONFIRM'.

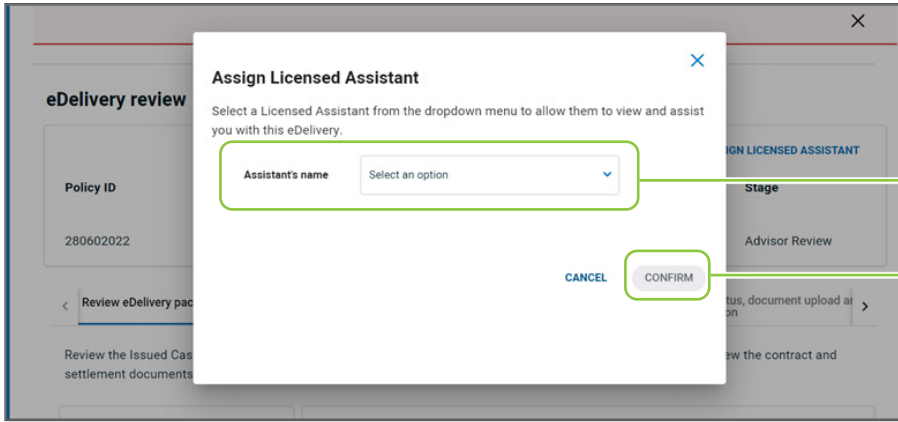
○ Servicing advisors can click here to assign a licensed assistant.



! When a licensed assistant is assigned, the servicing advisor is still the individual who is ultimately responsible for the delivery and is required to sign the delivery documents.

Licensed assistants will also be copied on all notifications that the advisor receives once they have been assigned to the policy.

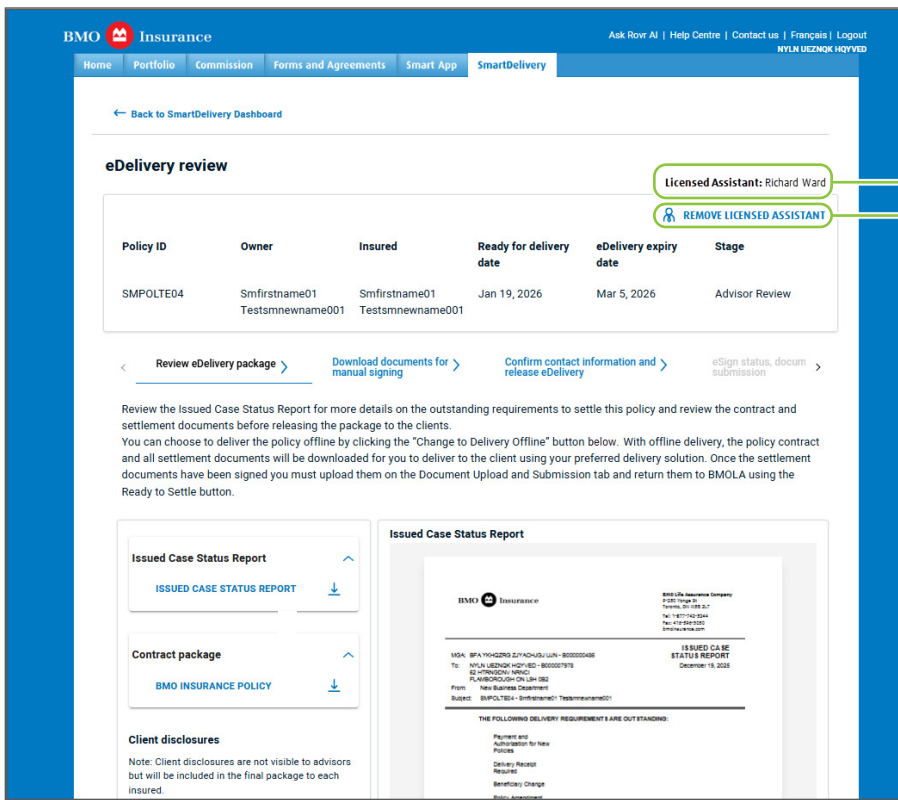
! For added flexibility, if a particular licensed assistant was assigned to assist with the completion of an application in SmartApp, the servicing advisor can assign that individual or another of their licensed assistants to eDeliver the policy. In other words, licensed assistants are NOT automatically assigned.



Servicing advisors can select the licensed assistant who may be assigned to the policy.

Then, click 'CONFIRM'.

Once a licensed assistant is assigned, their name will be visible to the advisor on the eDelivery Review screen.



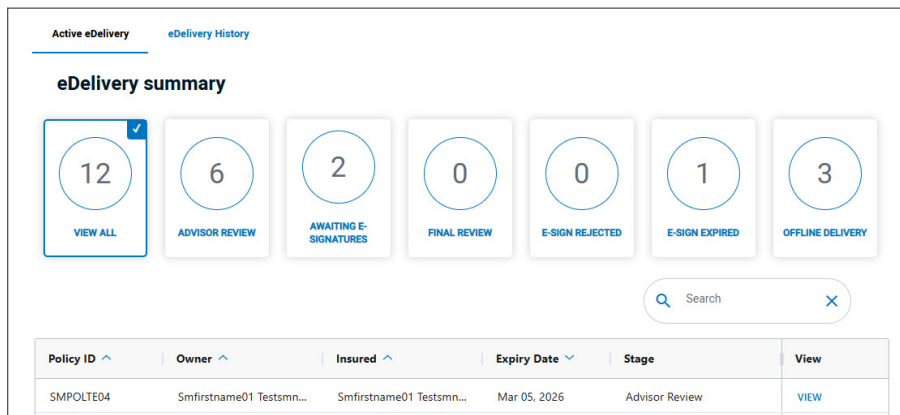
The assigned licensed assistant can also be changed, using the gear icon beside their name.

If the servicing advisor needs to revoke a licensed assistant's access to a SmartDelivery package, this can be done using the 'REMOVE LICENSED ASSISTANT' function.

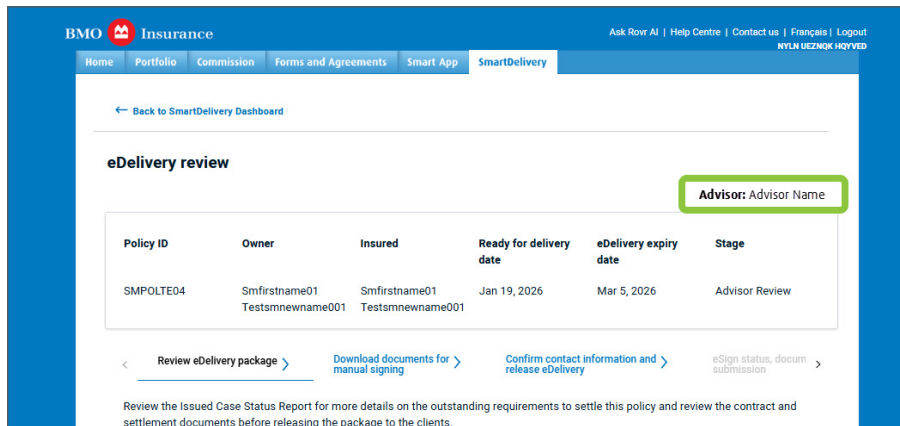
Working with SmartDelivery as a Licensed Assistant

Once a licensed assistant has been assigned to a SmartDelivery policy by the servicing advisor, the assistant can perform all the eDelivery functions described in this Guide, with the exception of signing the documents. The servicing advisor is still responsible for signing all delivery documents. If using online delivery, the advisor will receive their eSign invitation once all parties have completed their signatures. If using offline delivery, the servicing advisor must sign all settlement documents requiring an advisor's signature.

The SmartDelivery dashboard of a licensed assistant will display all the policies that they have been assigned to work on.



When a licensed assistant views a policy, the name of the servicing advisor will be visible on the eDelivery Review screen.





? Need help?

If you require assistance with the SmartDelivery process, please contact our Digital Support Team (DST) at Insurance.DST@bmo.com or 1-855-208-3675 from Monday to Friday, 9:00AM - 6:00PM ET.

If you have questions about the specific delivery requirements or contract for a specific policy, please contact your MGA/National Account New Business team.

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**.



Ontario Region
1-800-608-7303

Quebec – Atlantic Region
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1-877-877-1272



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