iA Digital Solutions

Partners
in your success

EVO

Streamlining insurance

You will need to download the Interface Suite

No internet connection necessary

A secure connection to the Advisor Centre
is required to transfer data

An intuitive,
adapted sales
experience

E-signature
integrated
into EVO

Products available for sale in EVO

— Traditional
— Universal
— Participating
— Critical illness
— Simplified issue

New sales

Illustration tool

— Benefit from an overall view that instantly provides a
  premium and a detailed summary of the coverage
— Easily compare coverage options and their premiums
— Sales concepts:
  - Estate bond
  - Shared ownership

Electronic application

— Instant decision on simplified issue products up to
  $2M for clients age 50 and younger and contracts
  issued in less than 24h
— Interactive medical questionnaire adapted to each
  client's situation

Change to an in-force policy

You can now take advantage of a 100% online process
to make changes in EVO, from entry to signature!

Some changes you can make with EVO:

— Changing the beneficiary
— Redemption
— New banking information

iA Financial Group

INVESTED IN YOU.

ia.ca

EVO

Simplifying savings

Internet connection required

You must be signed in to
the secure Advisor Centre

Launch EVO

Savings
applications
take less than
9 minutes!

E-signature
integrated
into EVO

New contracts

Registration options:

— Tax-free Savings Account (TFSA)

— Registered Retirement Savings Plans (RRSPs)
and Locked-in RRSPs

— Locked-in Retirement Account (LIRA)

— Non-registered under $4M ($3M for
the FundSERV network)

• Individual: Applicant and annuitant are the same
person

• Entity: Company, corporation, etc.

Contribution options:

— Pre-authorized debits (PAD): one-time or periodic
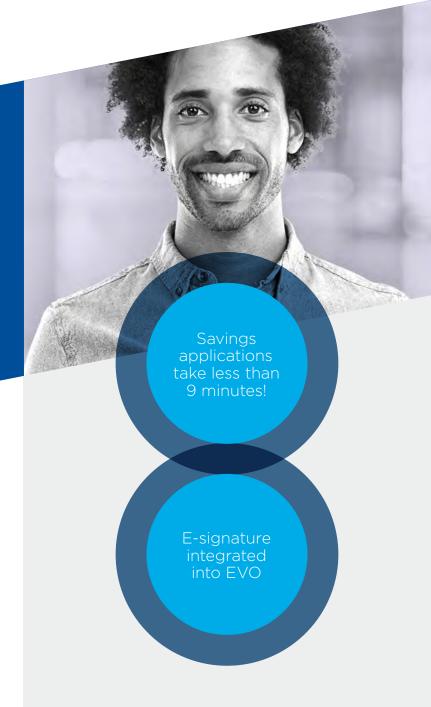
— Request for transfer from another institution

Contribution to an in-force contract

Registration options:

— TFSA

— RRSP

Contribution options:

— One-time or periodic PAD

Other transactions available in EVO

— Interfund transfers

— 75/100 resets

— Prestige Series eligibility: Prestige grouping

— Changes to client contact information
(address, phone number, etc.)

iA Financial Group

INVESTED IN YOU.

ia.ca