



EVO

Streamlining insurance

Internet connection required

You must be signed in to
the secure Advisor Centre

[Launch EVO](#)



An intuitive,
adapted sales
experience

E-signature
integrated
into EVO

Products available for sale in EVO

- Traditional
- Universal
- Participating
- Critical illness
- Simplified issue
- Specialized life insurance

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



EVO

Simplifying savings

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New contracts

Registration options:

- Tax-free Savings Account (TFSA)
- Registered Retirement Savings Plans (RRSPs) and Locked-in RRSPs
- Locked-in Retirement Account (LIRA)
- First home savings account (FHSA)
- 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
- Amount borrowed through an RRSP loan

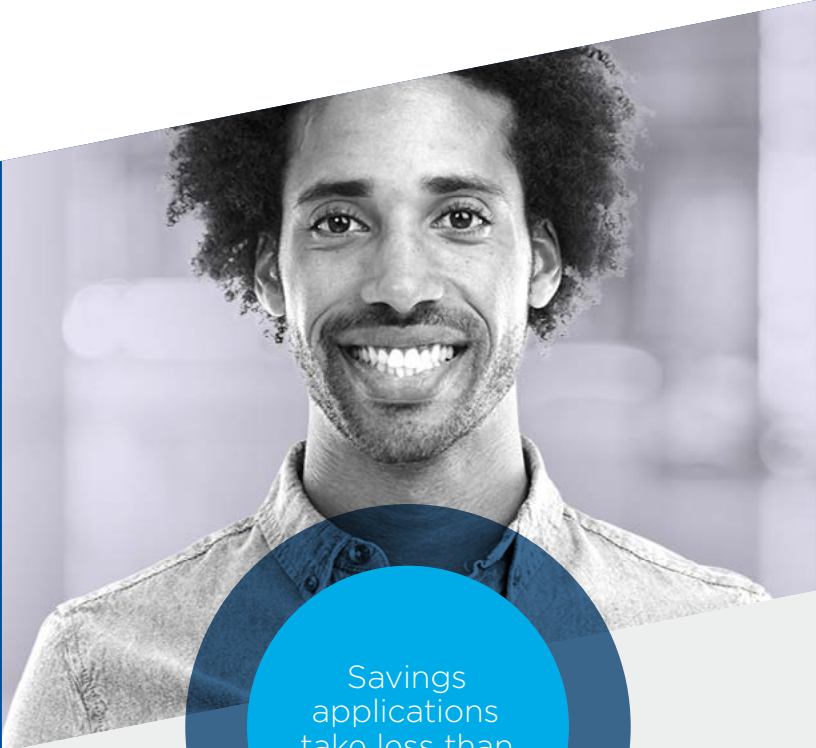
Contribution to an in-force contract

Registration options:

- TFSA
- RRSP

Contribution options:

- One-time or periodic PAD
- Amount borrowed through an RRSP loan



Savings
applications
take less than
9 minutes!

E-signature
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Other transactions available in EVO

- Interfund transfers
- 75/100 resets
- Prestige Series eligibility: Prestige grouping
- Changes to client contact information (address, phone number, etc.)