Insurance

# FAQ
# EVO Insurance on the web

# The new EVO Insurance

## What is EVO Insurance?

EVO Insurance is a sales platform for iA Financial Group's individual insurance products. Previously, you would download the platform to your computer, but now you can access EVO on the web.

## What's the difference between EVO Insurance and EVO Savings?

The new version of EVO Insurance is fully web-based and is accessible from the Advisor Centre (as is EVO Savings). No need to download application updates to your computer. Starting this fall, you'll have access to EVO anytime and on any device, as long as you have an internet connection.

## What's new in the web version of EVO Insurance?

— **Multiplatform web use:** Now available anywhere, anytime, on any device, starting fall 2025 (tablet and cell phone).*

— **Enhanced experience with fluid, intuitive navigation:** Interface improvements, more frequent, real-time updates.

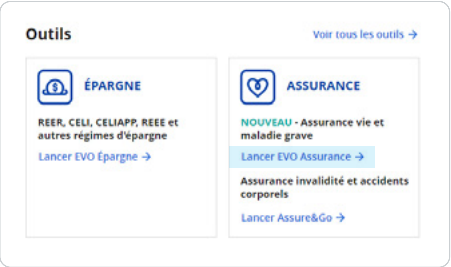
— **More secure environment:** The new version is now integrated into the Advisor Centre, providing a more secure environment and bringing all your work tools together in one place.

* For security reasons, Career network advisors will need to go through the Microsoft Intune administration center to launch EVO Insurance on a tablet or cell phone. iA FLEXIBLE Working Model rules apply.

# Signing in

## How do I access the new version of EVO Insurance?

Launch the new version from your Advisor Centre site (in the **Tools** section of the home page, click on the **Launch EVO Insurance** link).




## Do I need to log in to my Advisor Centre site to launch the web version of EVO Insurance?

Yes, you have to log in to your Advisor Centre site. Integrating EVO into the Advisor Centre strengthens data security and brings all your work tools together in one place.

## What should I do if I can't access the Advisor Centre?

If you've saved the link to the web version in your favourites, you can use it to access the platform. If that doesn't work, contact our support team at 1-888-610-5101 or at interface@ia.ca.

## Is there anything I should do when I first sign in to the web version of EVO?

Yes. When you log in for the first time, you'll have access to a virtual guide to help you through the new platform.

**You will need to select the same parameters (default values)** used in the downloadable version (province, commission rates, default advisor information, etc.).

## Can an advisor who is not under contract with iA Financial Group use the web version?

No, the web version no longer allows the use of "guest" mode for non-registered advisors. An advisor must be under contract with iA and have a valid agent code to access the web version and sell insurance products. Make sure you are under contract before starting your sales applications.

## How do I get technical support for the web version?

When you log in for the first time, you have a virtual guide to change your default values, create a new illustration, share an application with a colleague, and more!

You can also watch our three demo videos: create an illustration, complete an electronic application and submit with an electronic signature.

If you can't find the answers to your questions, you'll be directed to a help page in the Advisor Centre. You can either call 1-888-610-5101 or chat with an agent.

# Features

### What are the new features of the web version of EVO Insurance?

There are no new features for now, apart from interface and navigation improvements. For example, you can open several tabs at once, and you can use the virtual guide to help you explore the new platform when you log in for the first time. Also, when you submit a sales application in the web version of EVO Insurance, you will be redirected to the home page, where you can track the status of your application. You no longer have to wait for the transmission to be completed before performing other actions on the platform.

You can still:

— Create an illustration

— Get customized pricing

— Complete a declaration of insurability with the client

— Make changes online (beneficiary, address, etc.)*

— Use the e-signature (with some exceptions)

— Get instant approval at point of sale for most clients

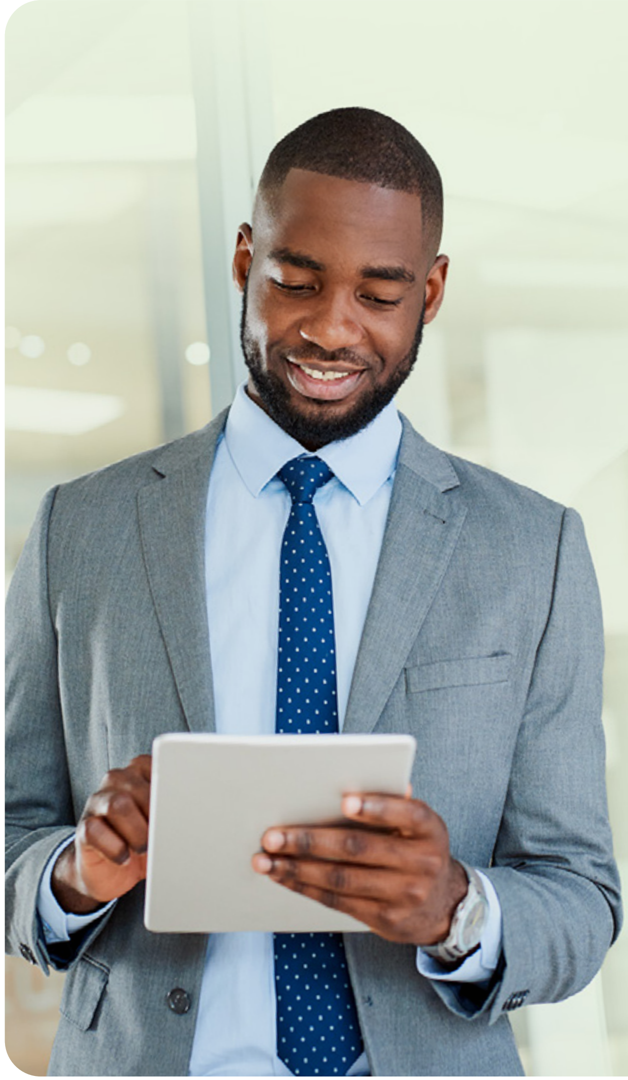
Lastly, you will no longer have to download new versions of the application, since updates will be made online in real time.

You will be notified as new features become available.

* Electronic changes will be added to the web version later this fall.

— In the meantime, you must continue to use the downloadable version to make electronic changes. Make sure you update your downloadable version throughout the transition period.

# Features



## What products can I sell using EVO Insurance?

— Traditional life
— Universal life
— Specialized life
— Participating life
— Critical illness
— Access Life*

* You must now submit your Access Life sales applications directly in the web version (the product will be permanently removed from Assure&go and EVO Desktop). Don't forget that many after-sales transactions can also be carried out directly in your Advisor Centre for Access Life.

**As of October 17**, only living benefits products and life insurance products offered as optional protection for these products will be available for sale in Assure&go. **Standalone life insurance products will no longer be sold in Assure&go**.

The Life and Serenity 65 and the Legacy specialized life insurance are no longer available for sale.

## Is it possible to sell multiple policies?

Not yet, but this feature will be available in the future.

## Will all my sales applications be accessible at all times in the new version of EVO Insurance?

— **Sales you have not submitted** will stay on your dashboard for 2 years before being deleted.

— **Sales you've submitted** to head office will be deleted 15 years after the date of submission.

## Is it possible to collaborate with others in the new web version?

Just like in the downloadable version, we invite you to use the case sharing feature to collaborate with others.

Users who must use the web version but who don't have access to the Advisor Centre will be able to obtain access via the delegation tool. See the procedure.

Note that this delegation does not give access to the sales data of the advisor granting the access.

## Is there a way to pre-fill the required forms when signing electronically?

Not at this time. However, we will be looking into this feature as the platform continues to evolve.

# Download version discontinued

## Can I continue to use the downloadable version of EVO Insurance?

Yes, you will still be able to use the downloadable version if necessary. However, we strongly encourage you to become familiar with the web version and to start your sales there.

Once the migration is complete, we will inform you of the key dates regarding the discontinuation of the downloadable version.

## Will my sales applications be transferred automatically to the web version of EVO Insurance?

Sales applications that you have started and not transferred to the downloadable application **will not be transferred automatically**.

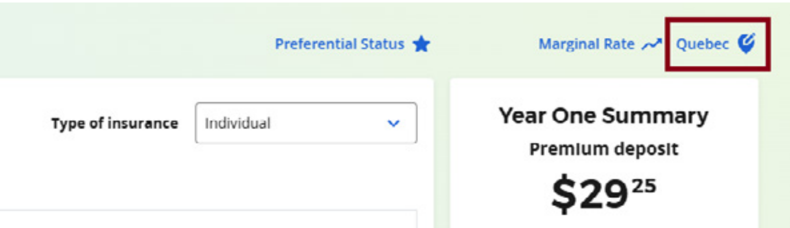
It is important to send those applications to the downloadable version and to use the web version of EVO for your new sales applications.

You'll still be able to download PDFs of the sales applications, illustrations and e-signature forms that you sent to head office.

# Technical questions

## How to change the province in a sales application?

Click the geolocation icon located at the top right of your screen.




To set a default province, go to the **Illustrations Configuration** section in the **Settings** menu.

## Why does the paper option of form F1E not work in some situations?

The paper option of the F1E form can cause problems in two situations:

— **On mobile**: The document is generated but may display an error message. You'll need to continue it on a computer.

— **On Mac with Safari**: The form can be opened with Adobe Reader on a PC, or through another browser.

## Which operating systems on mobile and tablet devices support EVO Insurance?

— **Apple**: iOS 16 and later

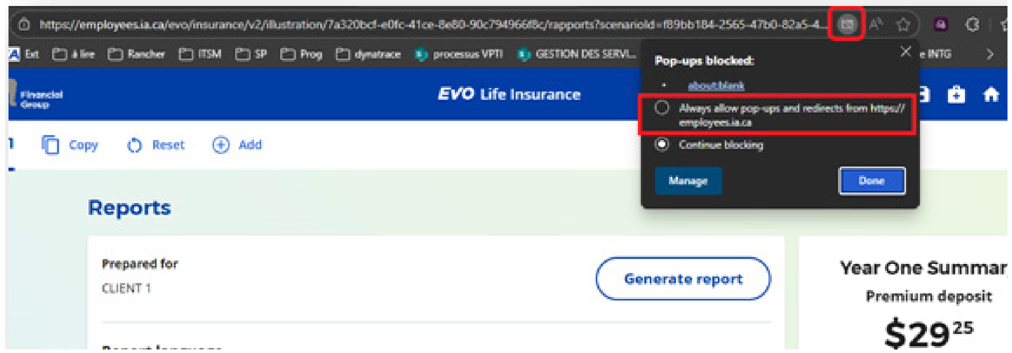
— **Android**: all versions

## Why am I unable to generate an illustration report on a tablet or in the Chrome browser on Android?

This issue is caused by a bug affecting tablets and the Chrome browser on Android. To work around it:

1. Tap the small box-shaped icon at the end of the address bar.
2. Select "Always allow".

This should allow the report to display properly. For a better experience, we recommend using a computer.



# Get ahead

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