

New Procedures for Electronic Documentation

With everyone practicing physical distancing during the COVID-19 pandemic, we have temporarily retooled our processes to better serve you—and your clients.

Obtaining Remote Signatures

The most straightforward path for collecting e-signatures is through an approved electronic platform, such as:

- OneSpan (formerly eSignLive)
- DocuSign
- iGenyPro
- Adobe

Should your client be unwilling/unable to provide an e-signature, confirm their email address and willingness to transact electronically. After you send the document by email, co-ordinate return of a signed copy through scanner, photo or written attestation. Finally, forward the document to BMO Insurance via your Transport Layer Security (TLS) approved MGA/Dealer and safely store all communications for seven years.

Electronic Transmission of Applications

- 1 Access GIF forms under Administration and Regulatory Documents at bmoinsurance.com/advisor/GIF
- 2 Send the Information Folder/Fund Facts links or PDFs to the client before receiving signatures.
- 3 Submit applications and supporting documents via your TLS approved MGA/Dealer or by fax at 1-855-747-5613.

Electronic Transmission of Administrative Documents

Other documents not related to applications can be submitted via your TLS approved partner by email: ClientServices.BMOLifeGIF@bmo.com or by fax: 1-855-747-5613.

Remote Identity Verification

Where verification of identity is required and you cannot meet the client face-to-face, dual process verification can be used by completing [form 798E](#). This ensures AML compliance (for example, in lieu of section 14 (1) of the GIF client-name application, a face-to-face verification).

Have other questions?

Please visit bmo.com/insurance/advisor/covid-19/

Important: For changes in beneficiary or ownership, power of attorney or limited trading authorization, we require the original document with a wet signature. These documents are NOT eligible for remote signatures.

 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, call 1-855-639-3867 or email ClientServices.BMOLifeGIF@bmo.com

BMO Life Assurance Company, 60 Yonge Street, Toronto, ON M5E 1H5

Ontario Region
1-800-608-7303

Quebec – Atlantic Region
1-866-217-0514

Western Region
1-877-877-1272

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We're here to help.™

Insurer: BMO Life Assurance Company

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