

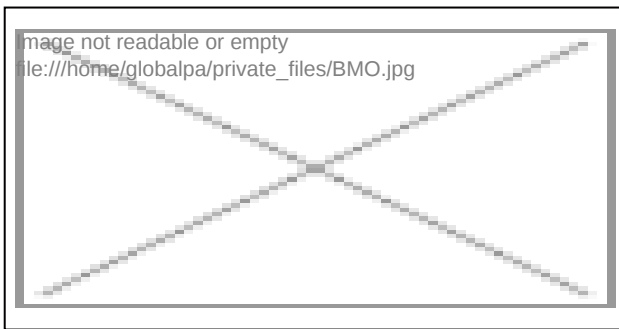
Online Applications - eApps

Submitted by Anar on March 26, 2017 - 8:11pm

Non Face-to-Face & Face-to-Face Application Process

Online Applications - eApps

Click on the carrier logo to acces their Electronic applications

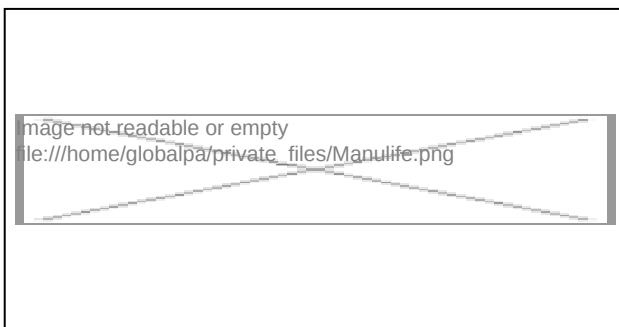


You will need to sign in, and then click the ?Smart App? tab, and then click ?New Application?.

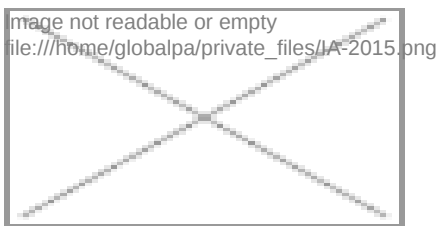


You will need to sign in, and then click ?Fast & Full Life Insurance? or ?Fast & Full Investments? which is located under the ?Quick Links? section on the right side.

**Please remember to use your FundServ Code for Fast & Full Investments, and not your Life Insurance Code*



You will need to sign in, and then click ?E-Application? which is located under the Insurance Category of ?Tools & Illustrations?. Then click on ?Start new case?.



For Electronic App (Life) | Open the iA Interface Software, Click on ?Insurance?, and click on ?EVO Launch? to the right. Begin your illustration, entering in client last name, first name and date of birth, and all other relevant details for the product being applied for. Once this has been entered, the ?Go to the e-application? button will be highlighted in the bottom right hand corner, and you will begin the electronic application process, which will prompt you to sign in using your advisor code and password.

For Electronic App (Savings & Retirement) | [CLICK HERE](#) You will need to sign in to ?Secure Access?, click ?My Tools and Applications? at the top of the screen, click ?New Issue ? Individual Savings & Retirement?, then click on ?Get Started?, and then ?Continue? in the lower right.

**Please remember to use your FundServ Code, and not your Life Insurance Code*

For Electronic App (RESP) | [CLICK HERE](#) You will need to sign in to ?Secure Access?, click ?My Tools and Applications? at the top of the screen, click ?RESP New Issue ? Individual Savings & Retirement?

**Please remember to use your FundServ Code, and not your Life Insurance Code*

For Electronic App (Disability) | [CLICK HERE](#) You will then need to click on ?Log In? at the top right.



You will need to sign in, and then click ?create a new case?.



Open the SSQ Illustration Software, and run your illustration. When complete, you may click the ?EA? button at the top of the screen to access the electronic application. You will need your password to access the electronic app.



You will need to sign in, and then click ?EZcomplete Online Application? located on the toolbar along the top, then click ?Go to EZcomplete?, and click ?New Application?. You will have the option to do an Insurance App or Savings and Retirement App.

*Please remember to use your FundServ Code for the Savings and Retirement App, and not your Life Insurance Code.

Source URL: <https://trustglobalpacific.ca/bulletins/2017-03-26/online-applications-eapps>