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## **iA Excellence – User Guide – Assure&go**

### **Sections :**

[How to create an account on Assure&go](#)


[How to complete paper applications using Assure&go](#)

[How to complete electronic applications on Assure&go](#)

This guide is intended for advisors who do not have an Assure&go account and still use paper applications. Since Pyramid, our old sales software, is no longer in use, our easy-to-use Assure&go is now the only convenient and efficient sales tool of choice. The process is very intuitive and simple with a few steps that can get you there in no time.

## How to create an account on Assure&go

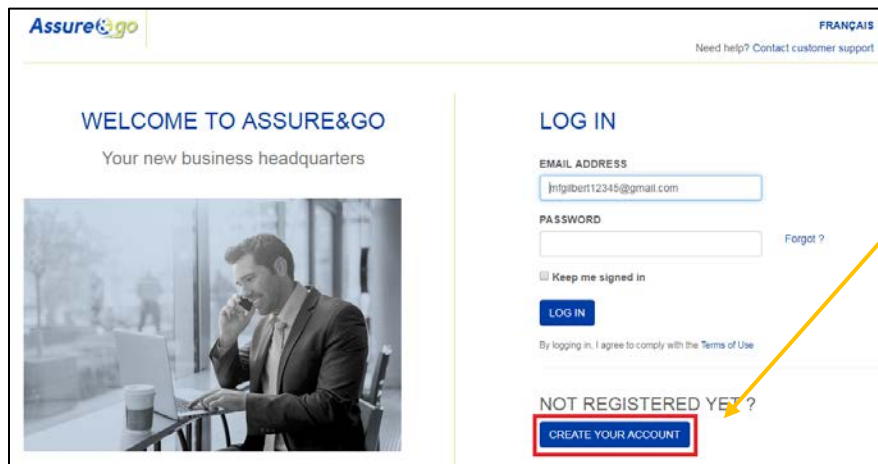
Prerequisites to create an account on Assure&go: an email address and a cell phone.

 <https://ago.iaexcellence.com>

Type: ago.iaexcellence.com



Click on “Log in” or “Get started now” to go to the login screen.



Click on “Create your account”.

## CREATE YOUR ACCOUNT

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**EMAIL ADDRESS**

**CONFIRM EMAIL ADDRESS**

**PASSWORD**

**CONFIRM PASSWORD**

✓ I'm not a robot

reCAPTCHA  
Privacy - Terms

**CONFIRM**

Enter your email address and your password twice. Confirm that you are not a robot by validating the images then click on "Confirm".

## ✉ VERIFICATION – STEP 1

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An email has been sent to your **test@gmail.com** email address.

Open this email and click on the confirmation link in order to move to the second step in our two-step verification: the validation of your phone number.

Why do we use a two-step verification? ⓘ

You have now reached step 1 of the verification process: an email will be sent to you. If you don't receive it within seconds, check your junk mail.

**Assure&go** INVESTED IN YOU.

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**DO NOT REPLY TO THIS EMAIL**

Hi,

Welcome to Assure&go!

We have successfully received your request to join our list of highly satisfied Assure&go users.

All you have to do next is to click the following link to confirm your email address:

[Confirm](#)

Please note that this link expires in one hour.  
In such a case, visit [ago.iaexcellence.com](http://ago.iaexcellence.com) again, sign in to proceed to the next step in creating your account.

Sincerely,

**IA Excellence**

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The Excellence Life Insurance Company  
1611 Cremazie Blvd. East, Suite 900  
Montreal (Quebec) H2M 2P2  
Telephone: 514 327-0020  
Toll-free: 1 800 465-5818

[iaexcellence.com](http://iaexcellence.com)

This message may contain privileged or confidential information. If you are not the intended recipient of this message, or if you have received it by mistake, please notify the sender immediately and delete the original without making a copy or disclosing its content.

Open the email from iA Excellence and click on "Confirm".

## VERIFICATION – STEP 2

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**YOUR CELL PHONE NUMBER**

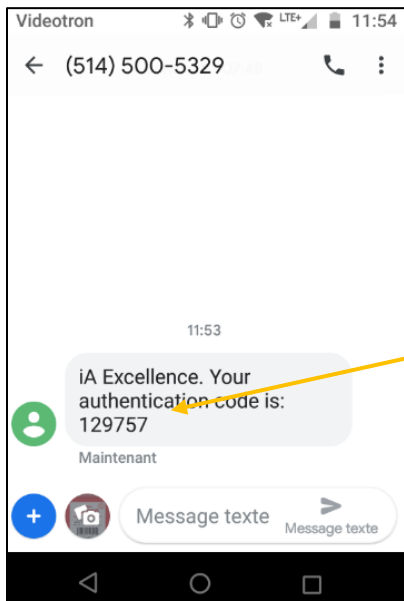
ex: 999 999 9999

After confirming your cell phone number you will receive an SMS containing an authentication code.

Why do we use a two-step verification? ⓘ

**CONFIRM**

You are now at step 2 of the verification process. Enter your cell phone number.



A six-digit authentication code will be texted to the given phone number for validation.

## VALIDATION

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An SMS containing an authentication code has been sent to the cell phone number you provided.

**YOUR AUTHENTICATION CODE**

129757

I will frequently use this computer. ⓘ

Keep me signed in

**CONFIRM**

If you have not received it, click on get a new code.

GET A NEW CODE

Enter the six-digit code and click on "Confirm".

We advise you to check both boxes "I will frequently use this computer" and "Keep me signed in" to save time whenever you log in.

If you don't receive a code, click on "Get a new code".

## YOUR INFORMATION

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**FIRST NAME**

**LAST NAME**

**PROVINCE**

**LICENSE NUMBER**

**CONFIRM**

Enter your information: first name, last name, province and license number, then click on "Confirm".

## YOUR INFORMATION

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**FIRST NAME**

**LAST NAME**

**PROVINCE**

**LICENSE NUMBER**

**ADVISOR CODE**

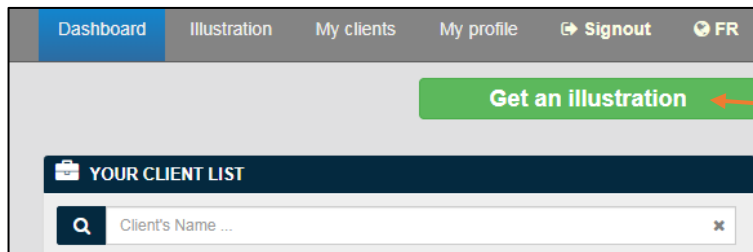
**CONFIRM**

Enter your advisor code and click on "Confirm".

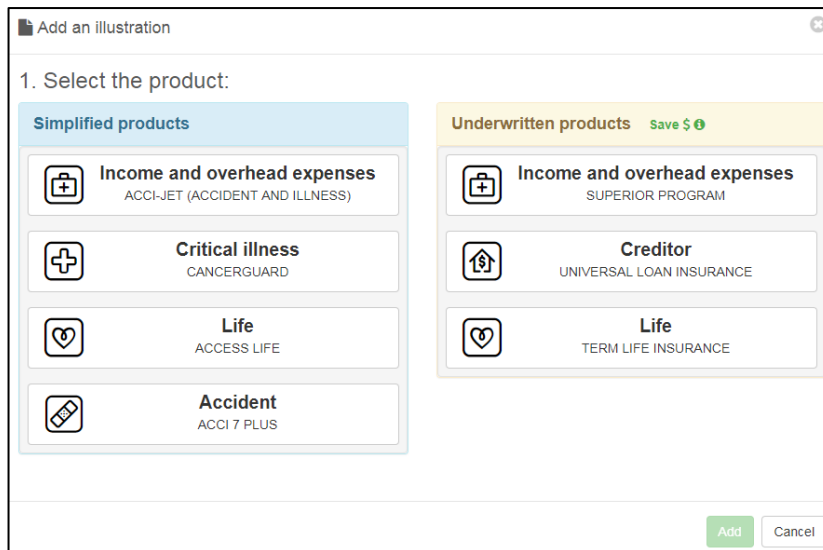
You're all set! Your account is now ready to start selling. Your information can be found and edited in the "My profile" section.

Note: If you face issues with your license number, you will receive a message asking if you would like to continue with limited access (no possibility to submit electronic applications). When this is the case, you can always seek the help of our Clients and Partners Contact Center at 1-800-465-5818.

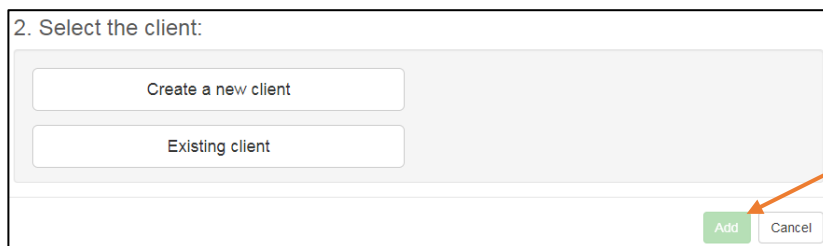
# How to complete paper applications using Assure&go



To start, click on "Get an illustration".



Select the product from our seven available options.



Select the client (new or existing) and click on "Add".

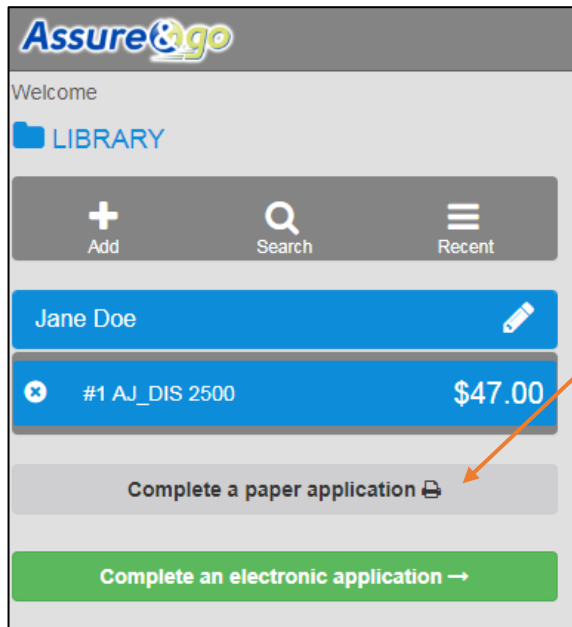
You are now all set to proceed to creating an illustration!

The process is very clear and spontaneous. If you ever leave something out or make a mistake, the system will automatically alert you in red colour or with an error message.

Here are the steps required to complete an illustration:

Enter the basic client information (name, gender, date of birth, etc.).

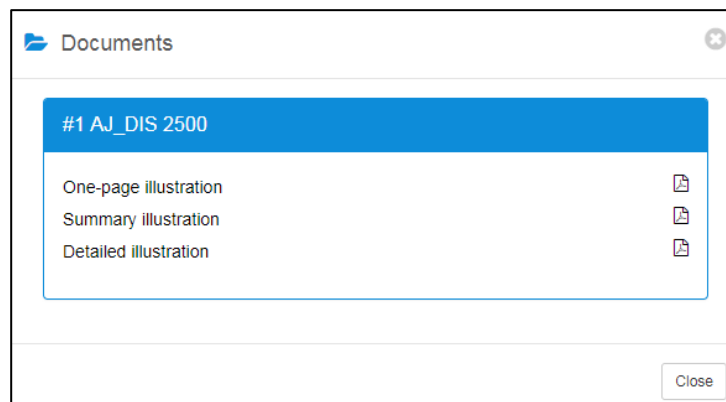
Complete the “Coverage” section which includes all available options depending on the product of choice.



When the “Coverage” section is completed, click on “Complete a paper application”.

You will have the choice of three illustration formats:

- One-page
- Summary (+ cover page and product description)
- Detailed (+limitations, exclusions and definitions)



Save the illustration, print and enclose with the paper application.

## Keep in mind...

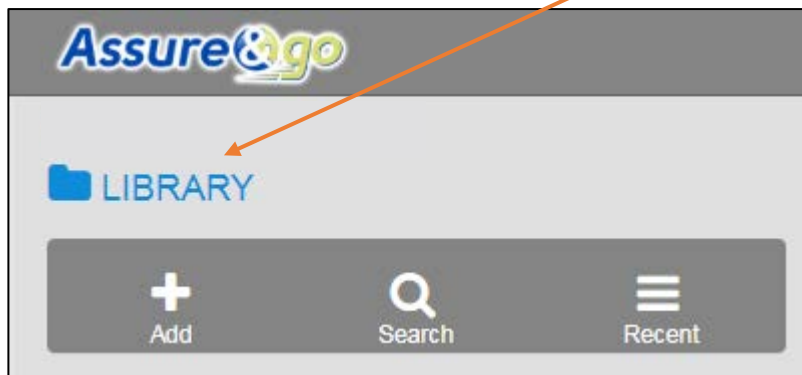
**Underwritten products:** Needed medical requirements, if any, will be listed at the end of the illustration.

**CancerGuard and Access Life:** Rates will be accessible only after providing answers to eligibility questions since rates vary depending on each client's health status.

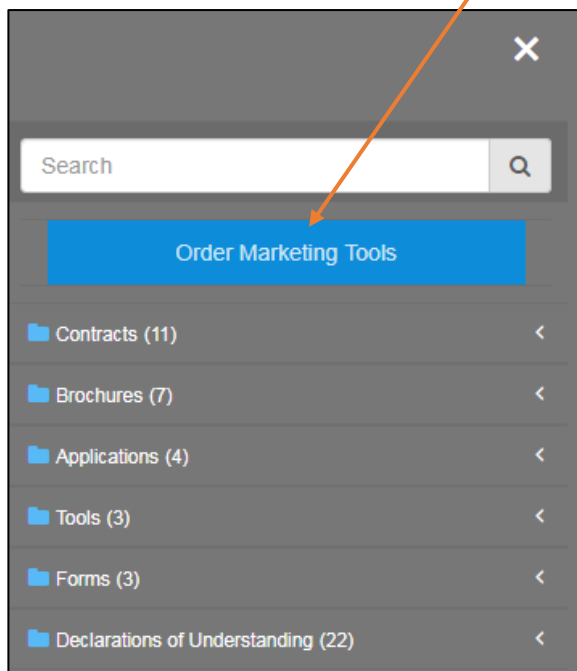
**Access Life:** Available electronically on Assure&go only.

**Acci 7 PLUS:** Only the one-page illustration is available.

All documentation related to sales (including applications, brochures, contract specimens, forms, diverse tools, etc.) are always available through our "Library".



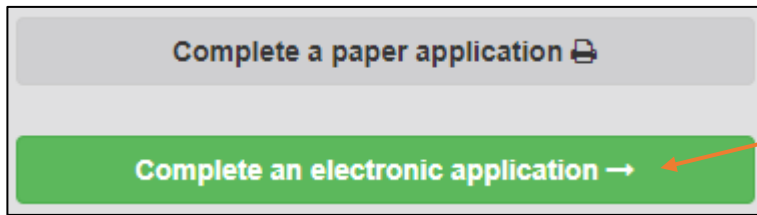
You can also order all your marketing documentation through the "Library".



Note : illustration can be prepared and printed before visiting your client if Internet access is not guaranteed.



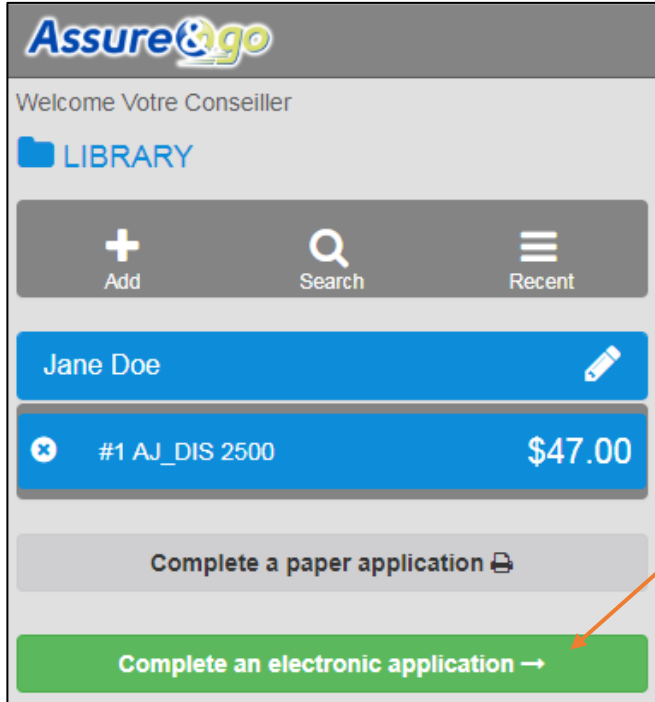
## Time-saving tips for you and your client



Valuable advice: Opt for completing an electronic application rather than a paper one and you will see how easily you will fall in love with using Assure&go!

# How to complete electronic applications on Assure&go

Once you have completed the illustration based on your client's needs, follow the steps below:



Click on "Complete an electronic application".

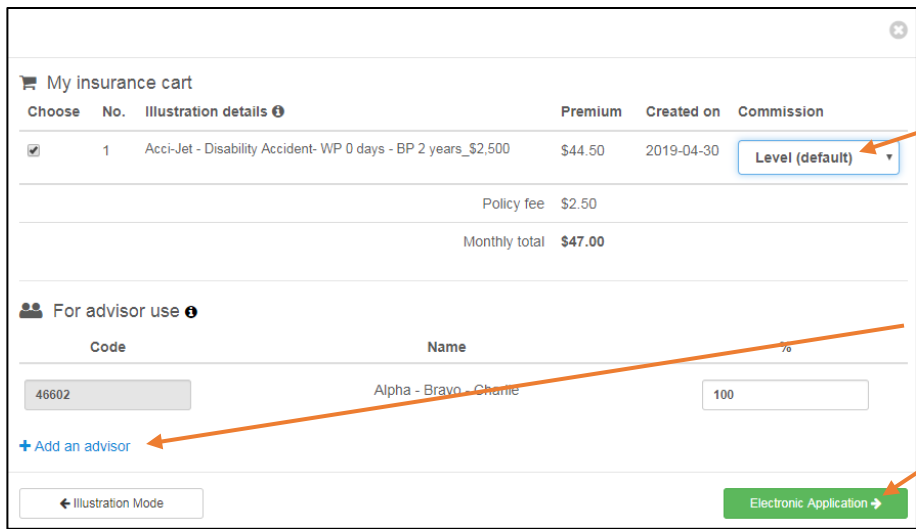


Illustration details show in the cart. If required, select the commission type.

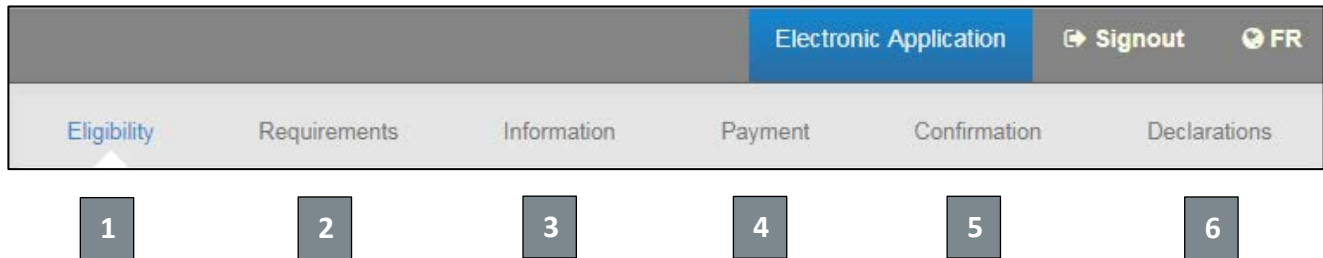
If you want to share the commission, click on "Add an advisor".

Click on "Electronic Application".

You now have **five easy-to-complete steps** for simplified issue products...



... or **six steps** for underwritten products.



“Eligibility” step: Eligibility questions to answer with your client or an opportunity to review and confirm the answers provided in the illustration.

“Requirements” step: Details related to the telephone interview and the medical requirements to order.

“Information” step: Addition of personal and/or professional information.

“Payment” step: Information on type of payor, method of payment, pre-authorized debits and interim insurance agreement, if applicable.

“Confirmation” step: Important step to revise all provided information. After this step, there is no possibility to make any additional changes.

“Declarations” step: Insured’s and policyholder’s general declarations, pre-authorized debit agreement, authorization to collect and communicate personal information to third parties and advisor’s declaration.

To finalize the process, the only thing left is the electronic signature of your client by sending a confirmation code either to a cell phone or an email. Once the code is entered, you just need to click on «Validate code». The electronic application is then automatically sent to our offices and will be treated at the earliest possible date.

**ELECTRONIC SIGNATURES**

A confirmation code will be sent to you. The combination of your confirmation code and your name, when validated, constitutes your electronic signature. By sending your confirmation code to the advisor, you confirm that you have reviewed the declarations of eligibility and insurability that relate to you, that you agree with their content and that you consent to their being submitted to The Excellence Life Insurance Company in support of this application for insurance.

**How do you want the confirmation code to be sent to you?**

**General declaration, Payment authorization, Authorization to collect and communicate personal information to third parties - Signature of primary insured Jane Doe**

Signed in

1 Sending method:  Cell phone (text)  Email

2  \* If your client did not receive the confirmation code, click "Send code" again to send a new code.

3

4

The electronic application in PDF format will be accessible for you to save or print.