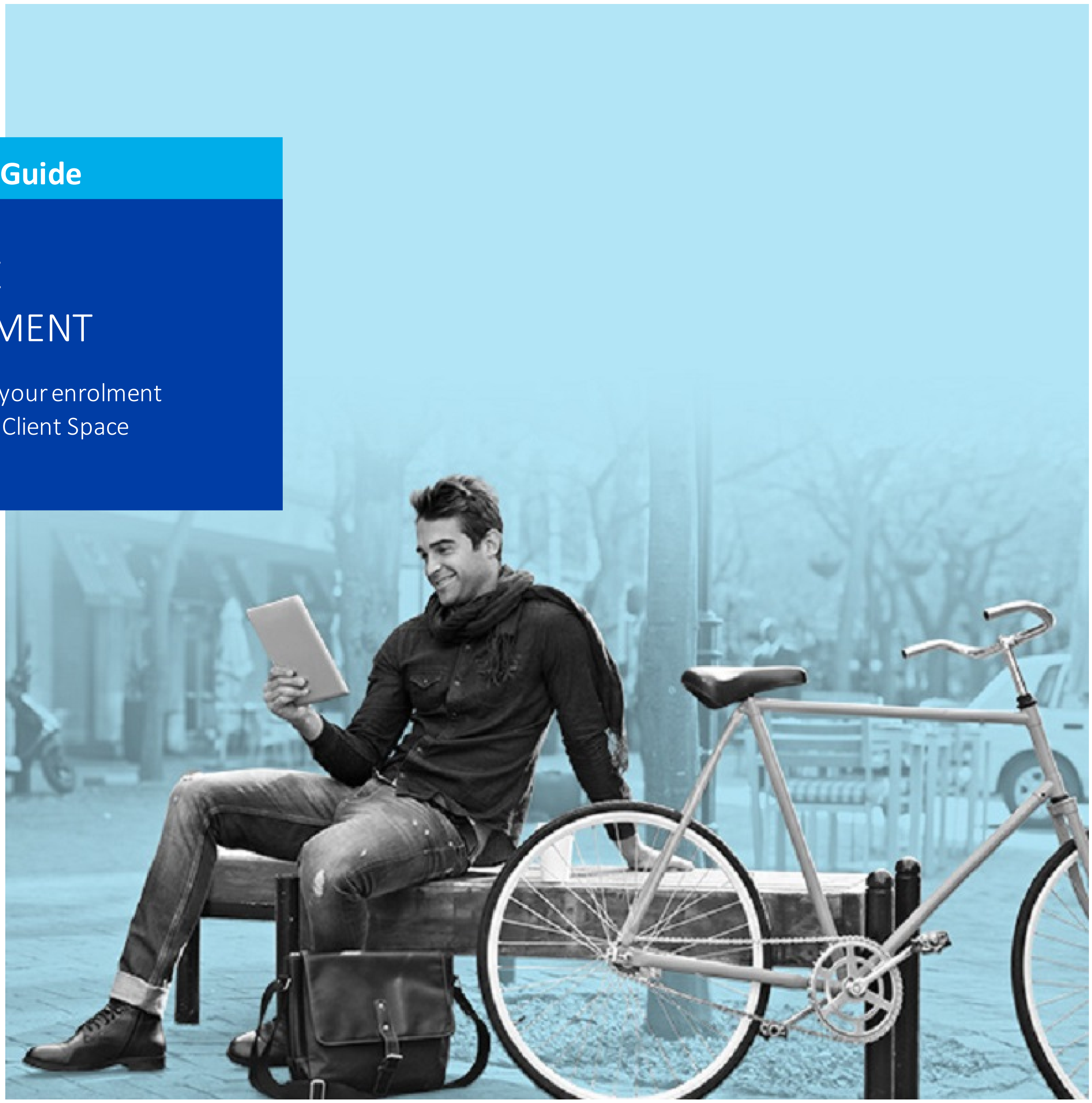
GROUP INSURANCE



Member Guide

ONLINE ENROLMENT

Completing your enrolment through My Client Space

iA Financial Group

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Part 1 – Create your access code and password for My Client Space

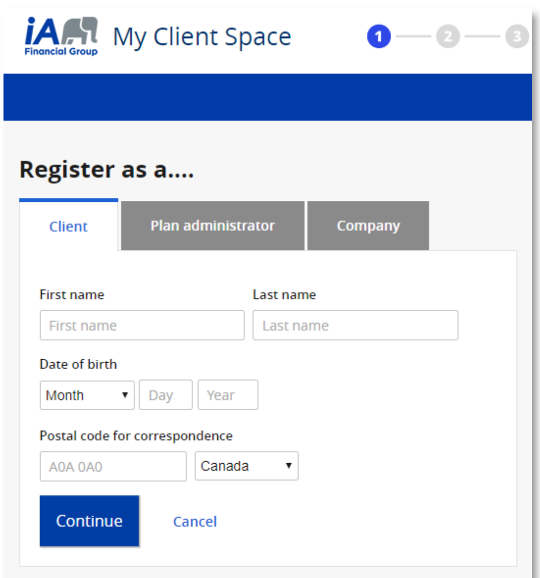
You will receive an email from iA Financial Group inviting you to create your account in My Client Space and complete your enrolment.

Step 1: Online registration

- Go to the following link: ia.ca/registrationkey

Step 2: Basic information

- Enter your first and last name, date of birth and postal code.
- Click on **Continue**.

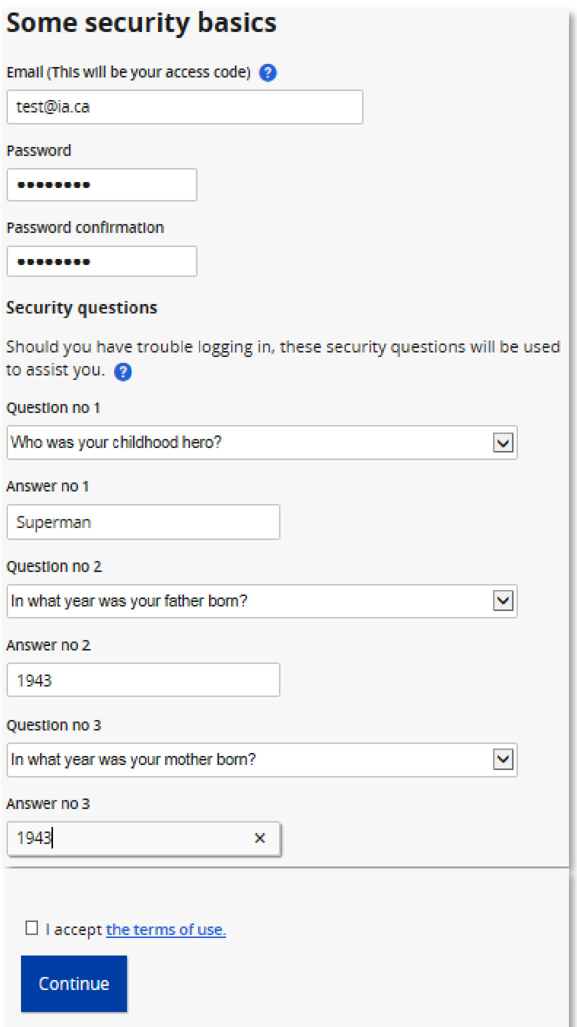


Step 3: Activation key

- Enter your activation key, provided in the email from iA Financial Group.
  Note: No other information can be updated at this screen.
- Click on **Continue**.

Step 4: Access code, password and security questions

- Enter your email, choose your password and your security questions.
- Read and accept the terms of use.
- Click on **Continue**.



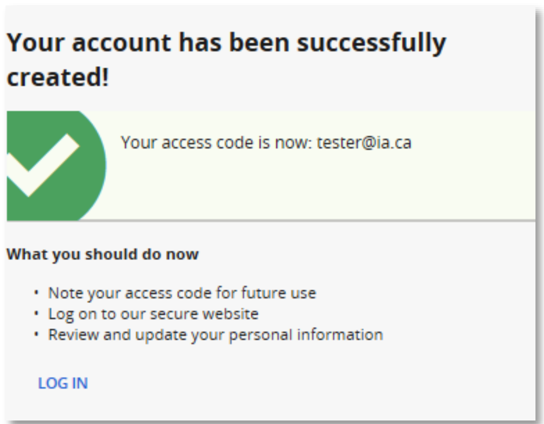
Step 5: Registration confirmation

You have now created an account and your new access code will appear on the screen. Make note of your access code and password as they are required to log into My Client Space.

Click on **LOG IN** to access My Client Space and complete your enrolment.

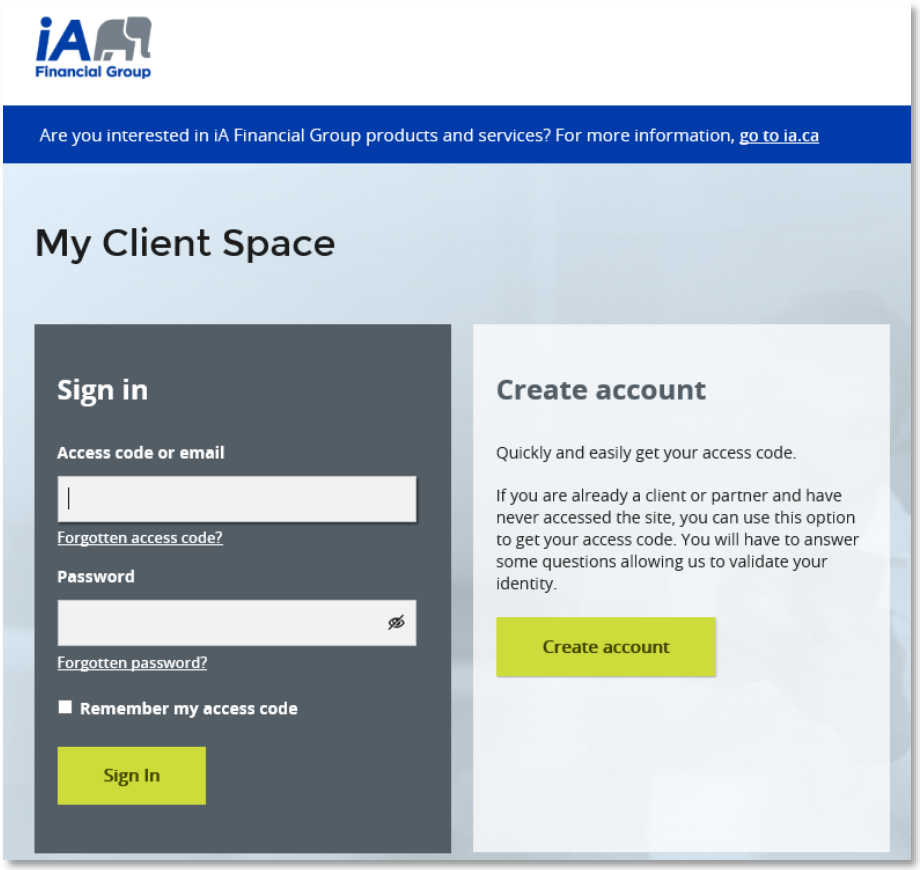
OR

You can go to ia.ca/myaccount anytime.



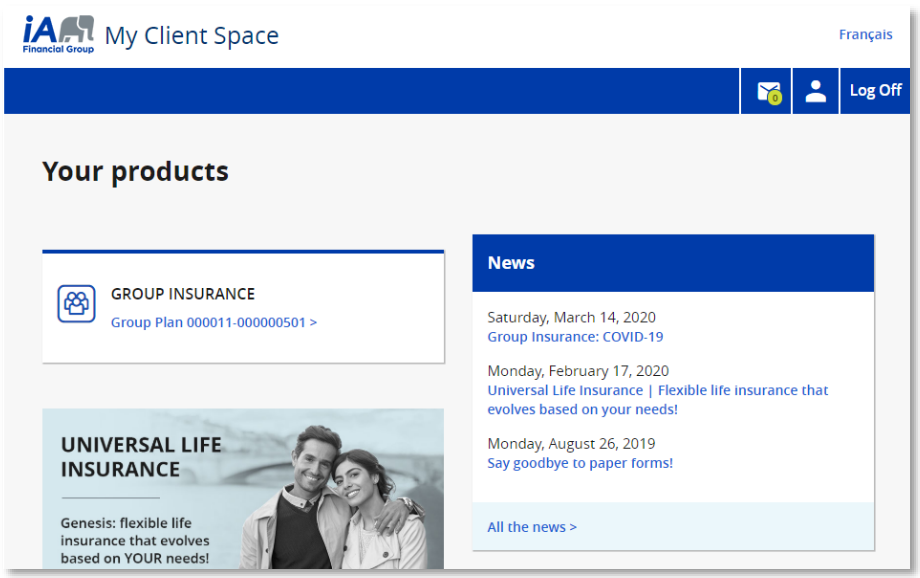
<u>Step 6</u>: My Client Space login

- Log into My Client Space using the access code and password you created.
- Click on **Sign In**.

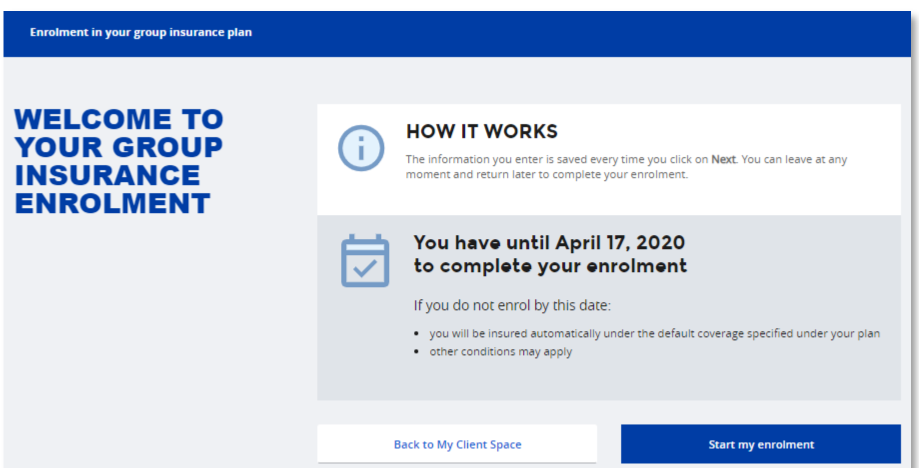


Step 7: Group insurance section

Click on the “Group Plan ###” link below the “GROUP INSURANCE” heading (Example: the link in this screenshot shows as “Group Plan 000011-000000501”).



You will be directed to the online enrolment welcome page. The information box provides the target date in which the enrolment must be completed. If it is not completed by the date indicated, default benefits will be automatically applied.



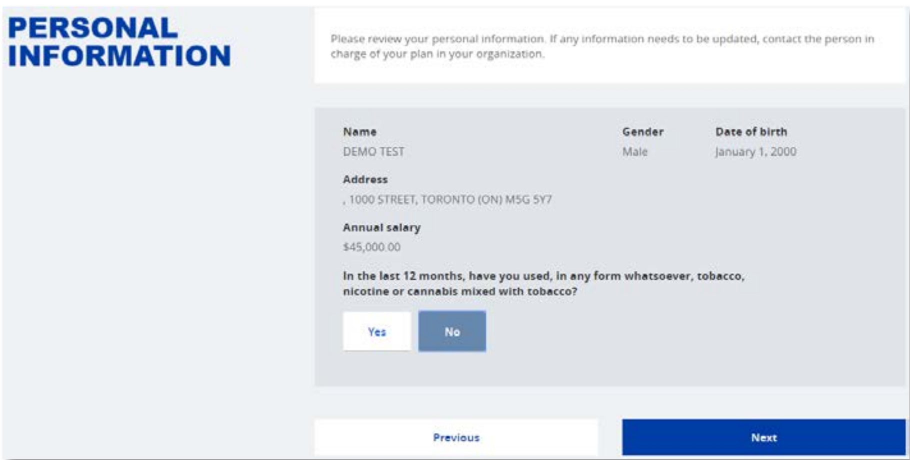
To complete the enrolment, click on **Start my enrolment**.

Part 2 – Complete your online enrolment

Step 1: Verification of personal information

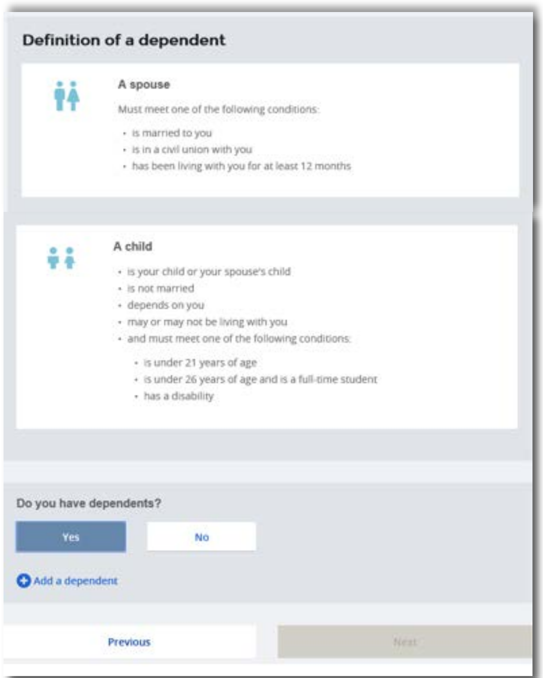
Each screen has an **Information** box that provides details to help you complete your selections.

The information on this screen has been added by the person in charge of the group insurance plan in your organization. Verify that the information is accurate and click on **Next** to continue. If information needs to be corrected, you will need to advise the person in charge of the plan once you have completed your enrolment.

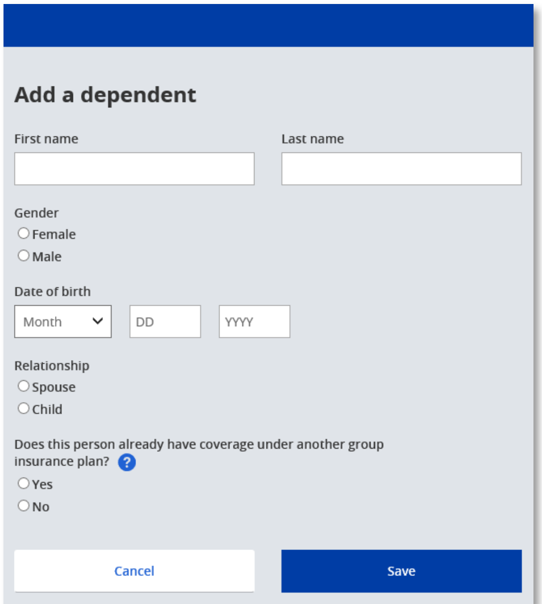


Step 2: Dependents

If you have any eligible dependents, you must enter the required information by answering **Yes** to the question "Do you have dependents?" and then by clicking on ⊕ **Add a dependent**.



Complete the information required and click on **SAVE**.



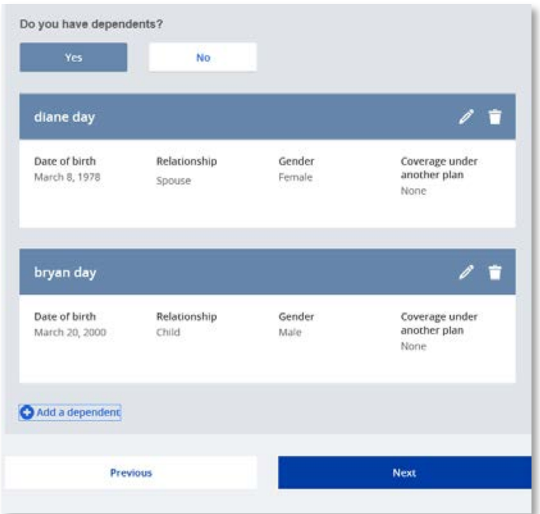
If you do not have any dependents, simply answer **No,** then **Next** to continue.

There may be additional documentation required (late enrolment) if you wish to add dependents in your health and dental plan after the enrolment period (31 days of joining). Refer to the definition of a dependent.

Once you have entered all your eligible dependents, click on **SAVE** to continue.

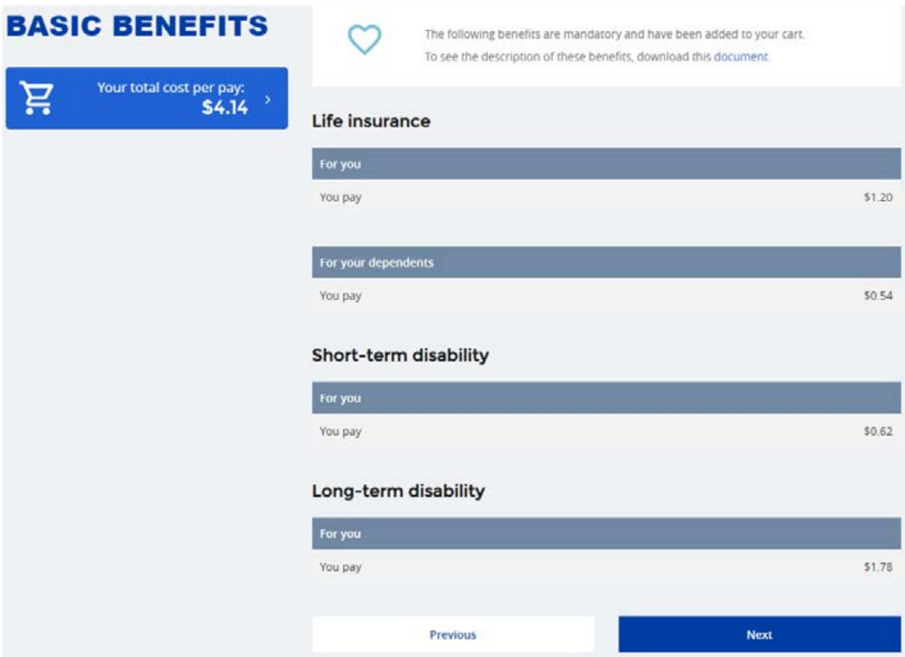
A list of dependents added will appear for you to verify.

You can select the **pencil** to make any changes or the **garbage can** to delete any dependents. Click on **Next** to continue.

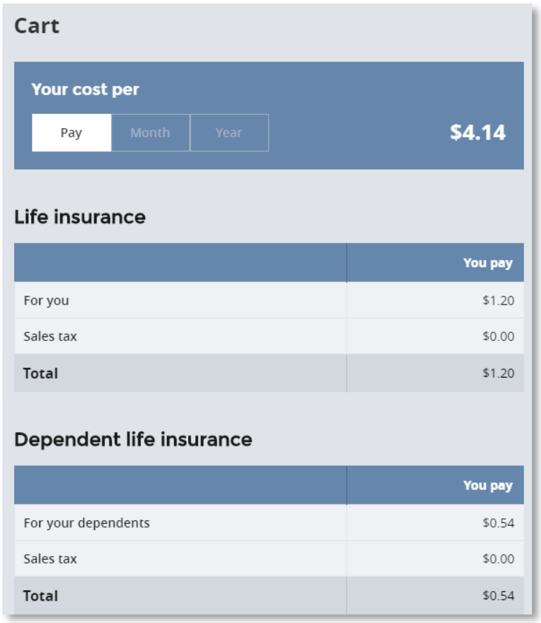


Step 3: Basic benefits

Some of your benefits may be mandatory which will be added to your cart automatically. Once you have reviewed the benefits and the cost, click on **Next**.



At any time throughout your enrolment, you may click on the cart if you wish to see the costs in more detail:

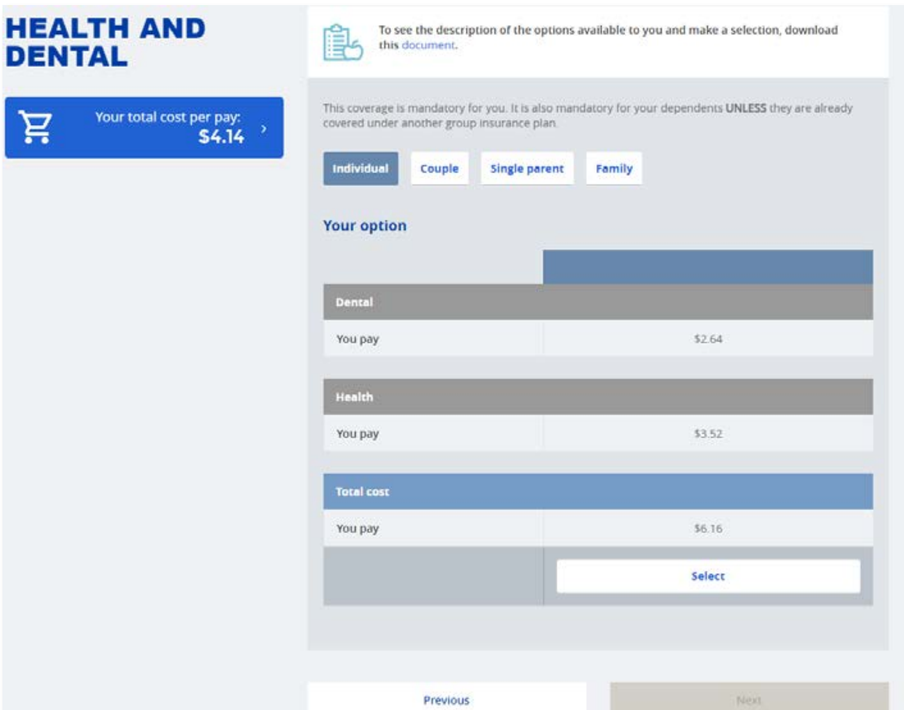


Step 4: Health and dental

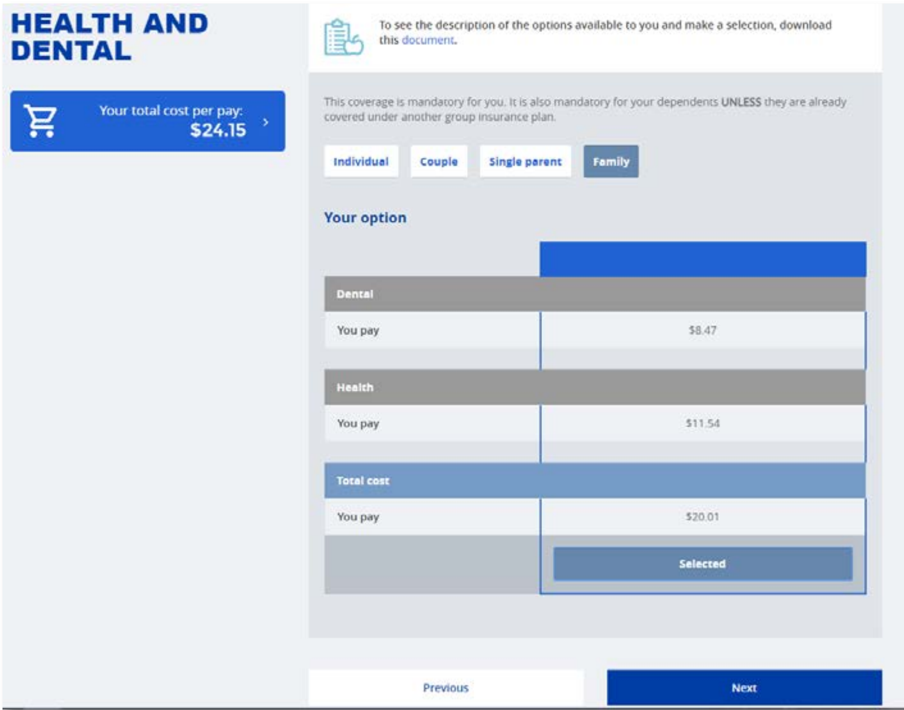
If you have added dependents, your coverage type choices will appear.

Note: *If you have not entered any dependents, only* ***Individual*** *will be shown as a choice.*

Select your type of coverage and click on **Select**.



The cost of your health and dental option is displayed. Click on **Next** to continue.

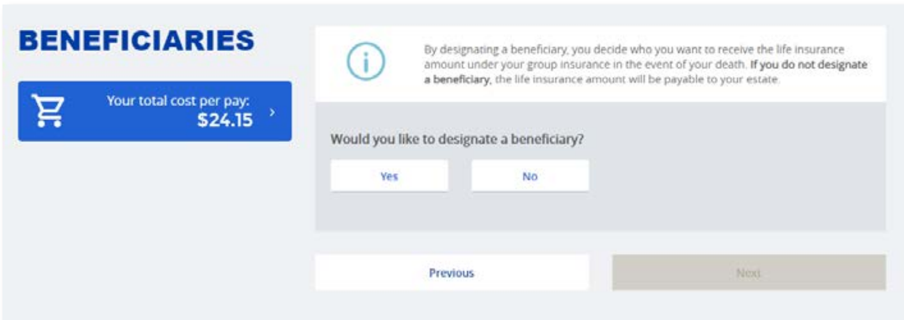


Note: At anytime throughout your enrolment, you may click on **Previous** to change your options or information entered.

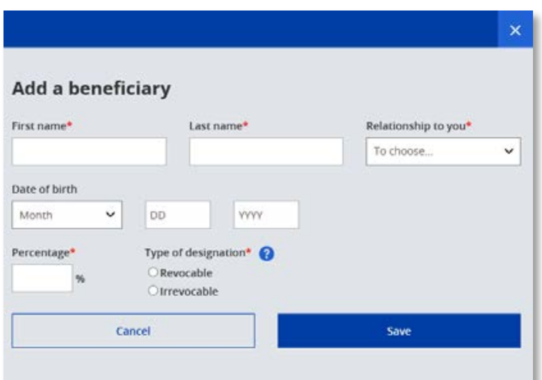
Step 5: Beneficiairies

If you wish to designate a beneficiary, you may enter the required information by answering **Yes** to the question and then by clicking on ⊕ **Add a beneficiary**.

If you do not wish to designate a beneficiary, simply answer **No** and **the life insurance amount will be payable to your estate**.



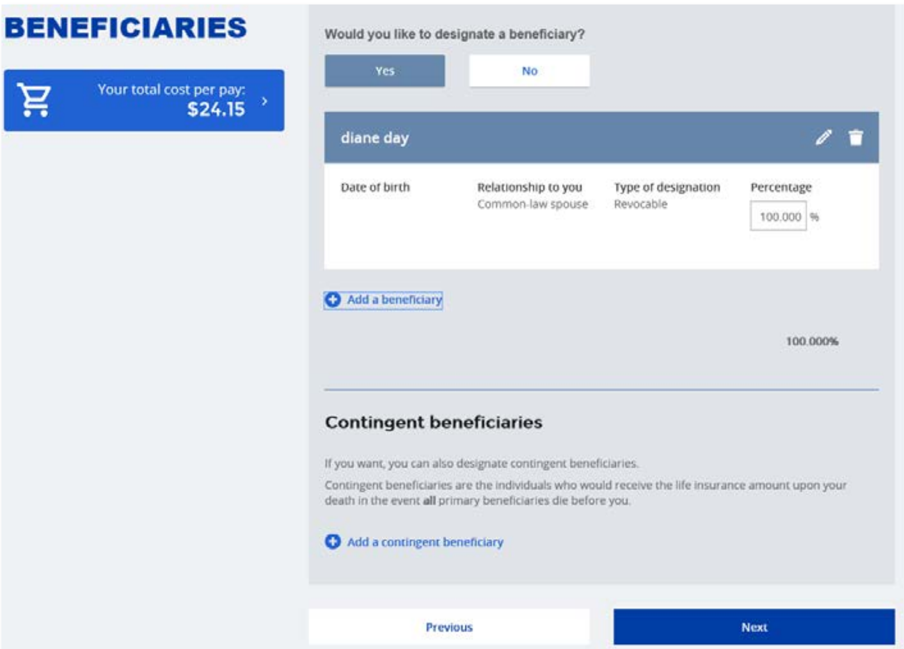
- Complete the information required, click on **Save**.
- Repeat this process to add more than one beneficiary, until you reach the total of 100%.
- Once you have entered all beneficiaries, click on **Save**.



If you want to designate contingent beneficiaries:

- Click on ⊕ **Add a contingent beneficiary**.
- Repeat this process to add more than one contingent.
- Once you have entered all beneficiaries, click on **Save**.

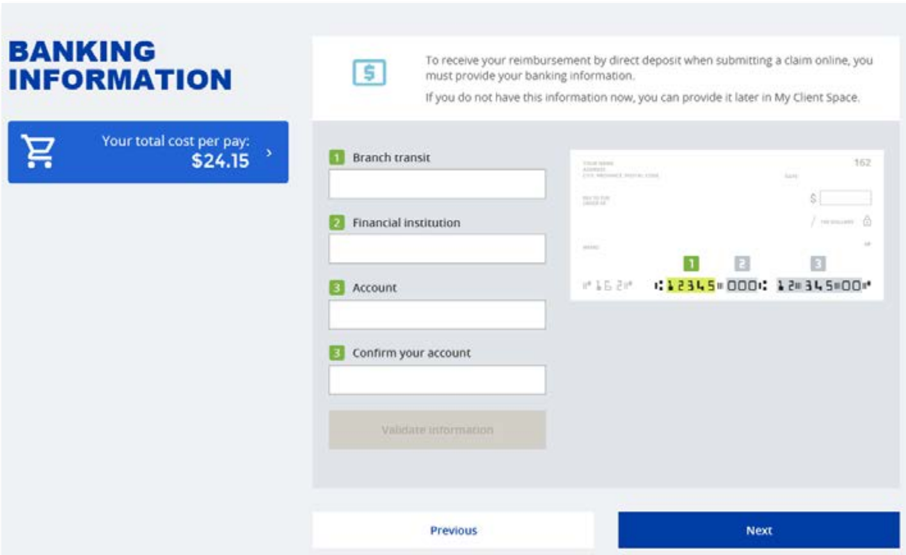
If you do not wish to designate contingent beneficiaries, click on **Next** to continue.



Step 6: Banking information

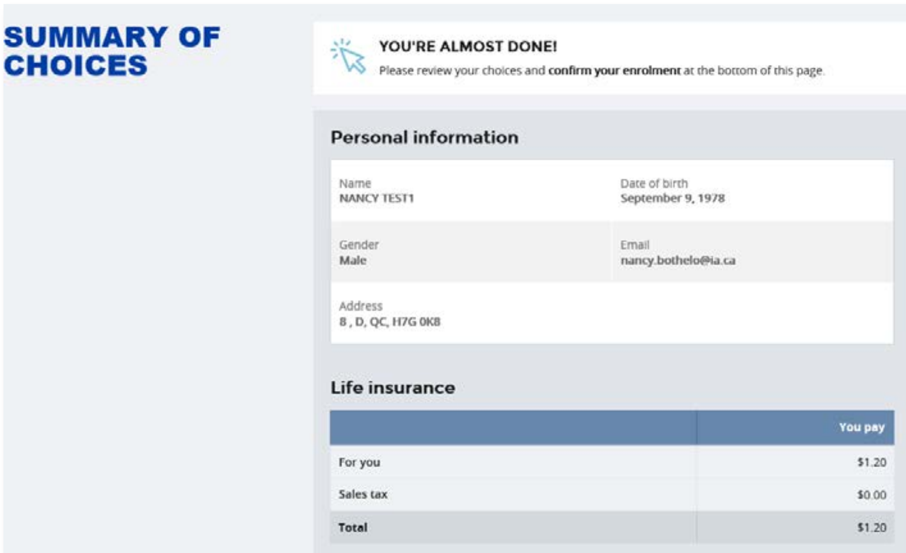
If you want to receive any claim reimbursement by direct deposit, you must provide your banking information and click on **Next** to continue.

If you do not wish to enter your banking information, simply click on **Next** to continue.

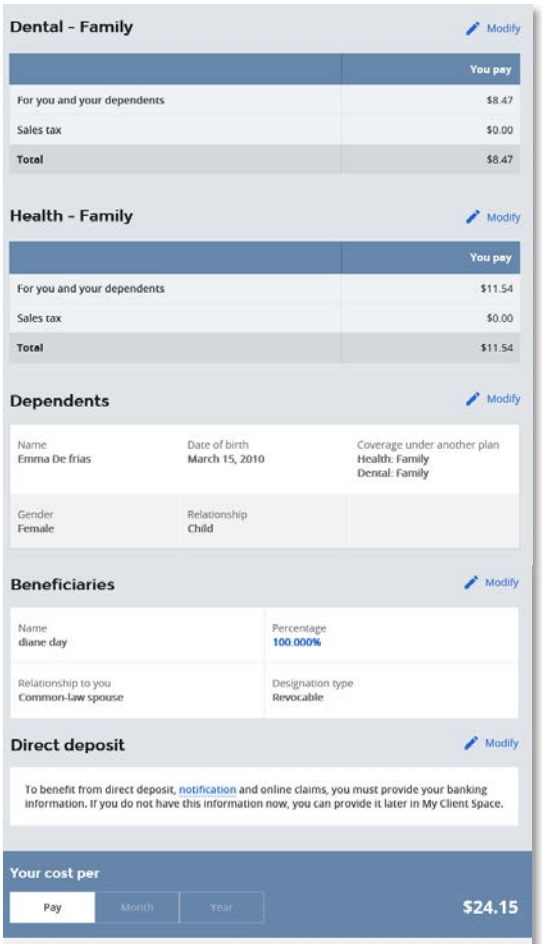


Step 7: Summary of choices

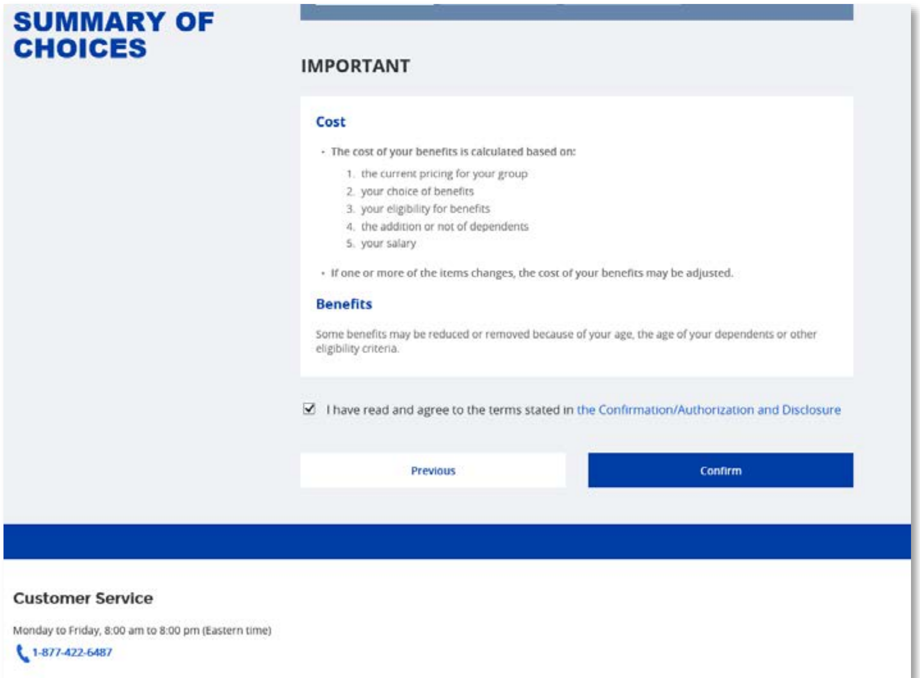
The Summary of choices page will appear. You can review the choices you have made and the details.



If you wish to change any information, you can click on **Modify** next to the benefit you wish to update and you will be taken back to that benefit information. You can also click on the **Previous** button at the bottom of the page to return to the previous pages.

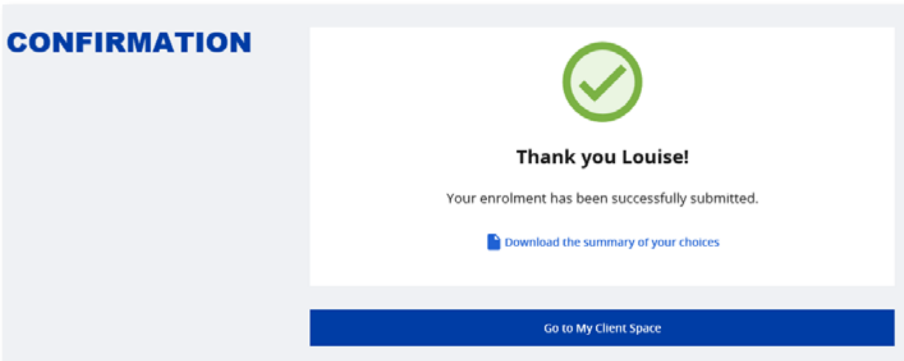


Once you have confirmed the information is accurate, click the check box in the **Confirmation/Authorization and Disclosure** section and click on **Confirm** to complete your enrolment.



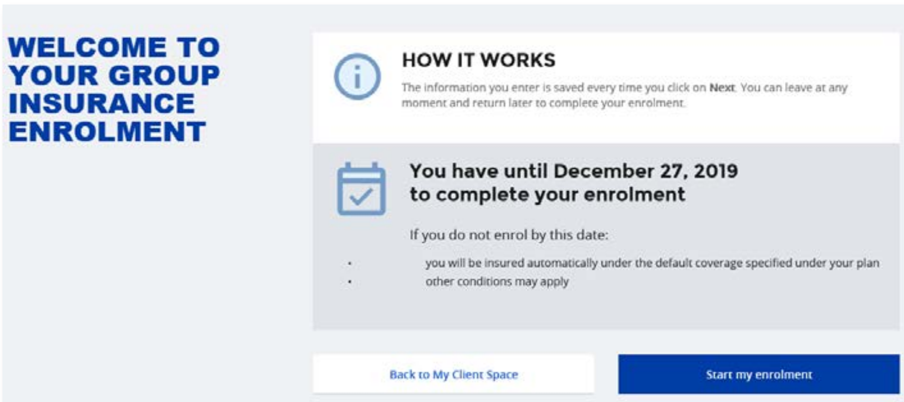
You will see a confirmation screen. **Congratulations! You have now completed the enrolment**.

You can also click on **Download the summary of your choices** to see a summary of the completed enrolment choices.



Enrolment follow-up process

You will have 31 days from the date the enrolment process began to complete your enrolment. Once you register to My Client Space, you will be directed to the enrolment screen and the information box will provide the target date in which the enrolment must be completed.



- 10 days prior to the target date, you will receive a reminder email to complete the enrolment.
- 5 days prior to the target date, you will receive another reminder email to complete the enrolment.
- If the enrolment is not completed by the target date, you will automatically be enrolled with the default benefits.

Questions? Need help?

Contact us.

1-877-422-6487

Monday to Friday, de 8:00 am to 8:00 pm (ET)

groupinsurance@ia.ca