

beneva

Mobile Office Savings and Investments

User Guide



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What is the Mobile Office?

Mobile Office is Beneva investment app available exclusively on the iPad.

It's an interactive questionnaire that replaces most of our paper forms and enables you to complete and submit your investment transactions.

The application, offered to our contracted advisors, also operates through the Fundserv network.

Once a transaction is submitted, it is immediately added to the investment system queue for processing. Members of Fundserv don't have to enter data at their general agent's office as the *Mobile Office* application will supply the general agent with their copies of the transaction in accordance with the advisor's profile instructions.

All electronic transmission channels are secure. Clients' confidential information is therefore protected. Electronic forms are sent by email as a secure attachment or via a link to the advisor, client and general agent.

Mobile Office support

8:00 a.m. to 5:00 p.m. ET Monday through Friday

Partners services

Phone: 1 877 707-7372

Email: brokerage.support@beneva.ca

How to get the application

Prerequisites

To use the application, an advisor must be under contract with Beneva and have active login credentials to the Advisor Centre.

You must own an iPad version iOS 12 or higher to support the application and get an optimal experience.

Downloading

To download the application from the App Store, you will need to obtain a code. The application is not available as a searchable application.

Redeem codes are available upon request from your sales team or the Partner Services team by email or phone:

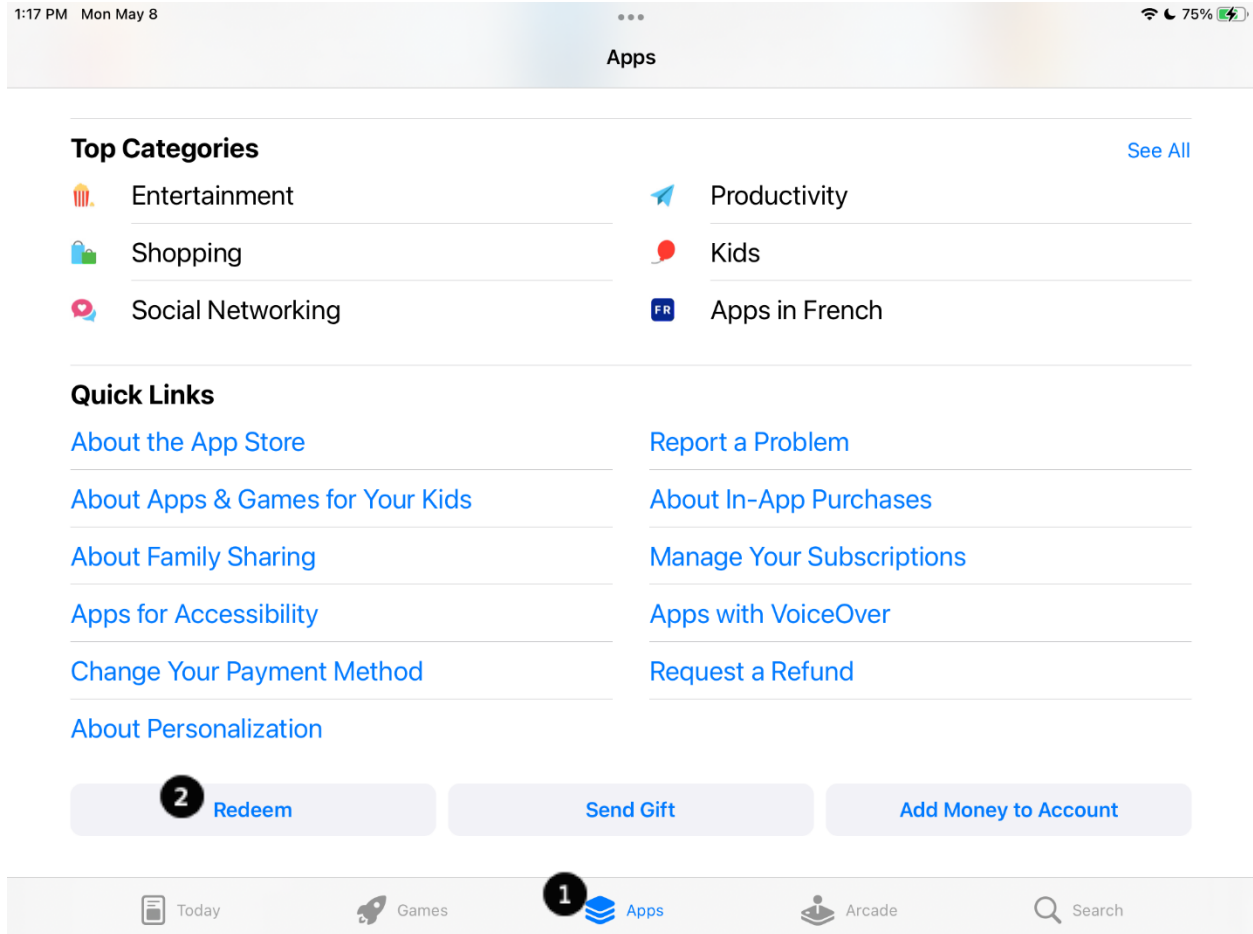
Phone: 1 877 707-7372

Email: brokerage.support@beneva.ca

How to use your download redeem code

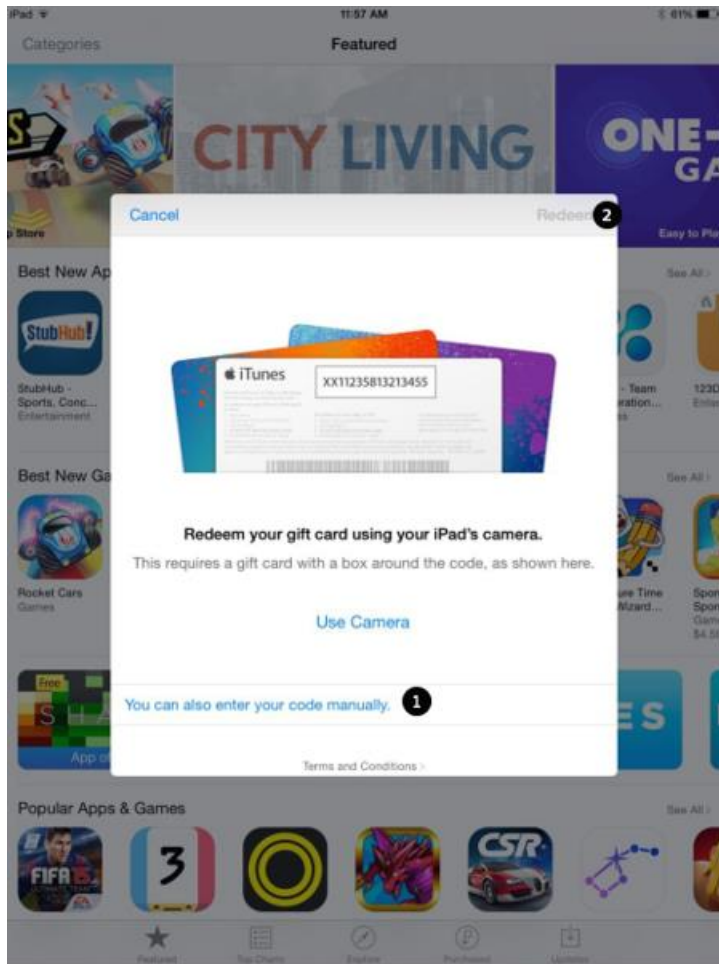
You must log into the App Store with your Apple username and password to download the Mobile Office application.

- Access the App Store from your iPad



- 1 Click on *Apps*
Scroll to the bottom of the page
- 2 Click on *Redeem*

The screen for entering the redeem code is displayed.



- 1 Enter your redeem code
- 2 Click on *Redeem*

The *Mobile Office* icon is displayed, and the app starts downloading. It will continue downloading even if you leave the page.

Accepting push notifications

The first time you log in, the application will ask for authorization to send you push notifications.



Be sure you agree to receiving these notifications.

The notifications will let you know, when a form has been completed and submitted but not received by Beneva. This could happen if you are not connected to the internet or if the internet connection has been interrupted.

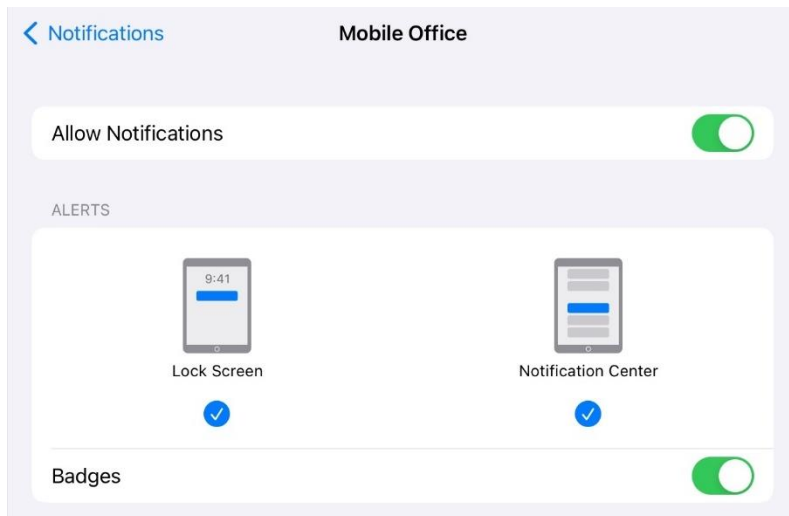
You can modify your preferences on your iPad at any time by accessing the following menu.



Settings > Notifications > Mobile Office > Allow notifications.

Double check that the following items are activated:

- Allow notifications
- Badges (Lock Screen and Notification Center)



Login in

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1 * Advisor Center Email

2 * Password

3 Submit

This application allows you to submit a form to apply or provide instructions for the following savings plans: NRSP, RSP, RIF, LIRA, LIF, annuities, TFSA.

[Protection of personal information](#)

[Terms of use](#)

The first time you use the application, the login screen will be displayed. You must be connected to an internet connection to verify your information.

- 1 In the *Advisor Center Email* field, enter the same email address you use to access the Advisor Centre. are using in the advisor Centre.
 - 2 In the *Password* field, use the same password you use to access the Advisor Centre.
 - 3 Click *Next*.
- If you forgot your password, or if it does not work, go to the *Advisor Centre's Forgot your password* section on the Beneva website (<https://www.beneva.ca/en>), then go to login as an *Advisor*.
 - If you are a new advisor, ensure that your contract with Beneva is established before using the application.
 - Your Advisor Centre account must be activated before you can log in.

The login screen protects the information contained within the application. For this reason, you must log in each time you begin a session or upon expiry of the inactivity period.



- To ensure the security and confidentiality of this information, you must activate the screen lock function of your iPad and protect it with a password.

Fill out the profile

2:59 PM Fri Sep 22 77%

Advisors's profile Pre-determined allocation

*Last name *First name *Fundserv Advisor ?
 Yes No

1 *Beneva advisor code 2 Alternate adviser code 1 Alternate adviser code 2
3052 — 1526 3052 — 2082 3052 — Code

3 Alternate adviser code 3 Alternate adviser code 4 *Advisor Center Email
3052 — Code 3052 — Code [redacted]@beneva.ca

*Email confirmation *Telephone Ext.
[redacted]@beneva.ca 418- [redacted] Ext.

4 **General Agent Information**

*Full general agent name *Email (for follow-up) *Email confirmation
[redacted] 5 general@[redacted].com general@[redacted].com

New form

- 1 Enter your Beneva advisor code.
- 2 If applicable, enter an alternative advisor code. A total of four additional advisor codes is permitted.
Some of the alternate advisor code is not editable. This is the part of the general agent code of the advisor. The one entered in the "Beneva Advisor Code" field will be automatically carried over for each of the alternate codes.
- 3 Enter the same email address as the one you use to log into the app and Advisor Centre. Your forms will be sent to this address.
- 4 Enter your Beneva general agent code
- 5 Your forms will also be sent to the email address that you enter in the General Agent section.

Fill out the Beneva agent code and Beneva general agent code

Code de représentant	Code d'utilisateur	Mot de passe
3052-1526	Bnvc0547845	Accéder à votre espace et Cliquez sur Me Connecter Utilisez le même mot de passe que pour votre connexion à l'Espace connecté des conseillers en assurance vie et maladies graves OU Configurer un nouveau Mot de passe

*Last name			<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
*Beneva advisor code	Alternate adviser code 1	Alternate adviser code 2	
1 3052 — 1526 2 ?	3052 — 2082	3052 — Code	
Alternate adviser code 3	Alternate adviser code 4	*Advisor Center Email	
3052 — Code	3052 — Code	_____@beneva.ca	
*Email confirmation	*Telephone	Ext.	
_____@beneva.ca	418-_____	Ext.	

General Agent Information

*Full general agent name	*Email (for follow-up)	*Email confirmation
_____	general@_____.com	general@_____.com

New form

- 1 Enter the general agent code in the *Beneva General Agent Code* field of the advisor profile. Based on the example above, code 3052 should be entered in this field.
- 2 Enter the advisor code in the *Beneva Advisor Code* field of the advisor profile. Based on the example above, the code 1526 should be entered in this field.

What type of requests can I enter?

Mobile Office facilitates the submission of application forms for a new plan or instruction forms for an existing plan. Following are the Beneva Investment products available:

- Investment accounts
- GIAs
- Equity Index GIAs
- Daily interest account (DIA)

Supported plans	Unsupported plans
RRSP/RRIF	Immediate annuity
LIRA/LIF	Non-registered for companies
TFSA	
Non-registered (unavailable with remote signature)	

Supported transactions		Unsupported transactions
Deposit	Transfer from another institution	HBP-RRSP Loan (Quebec only)
	Transfer from an employer's pension plan	
	Recurring debit payments (PAD) / creation and modification	
	Single debit payment	

Supported transactions		Unsupported transactions
Transfer	10% fee-free transfer	Unlocking all provinces
	Inter-account transfer	
	Transfer between 2 plans including conversion (RRSP to RIFF or LIRA to LIF)	
	Changes at maturity	

Supported transactions		Unsupported transactions
Withdrawal	Personal	HBP withdrawal
		LPP withdrawal
		RIFF/LIF payment option modification

Supported transactions		Unsupported transactions
Non-monetary transactions	Address change	Personal information changes (name, age, sex)
		Change of beneficiary
		Cancellation/correction

Complete the questionnaire

Taking the next step

To proceed to the next step, you must complete all mandatory fields on the *Stage screens*. When the mandatory fields are completed, the *Next* button is activated and becomes a darker yellow indicating you can proceed to the next stage.

4:17 PM Mon May 8 100% 🔋

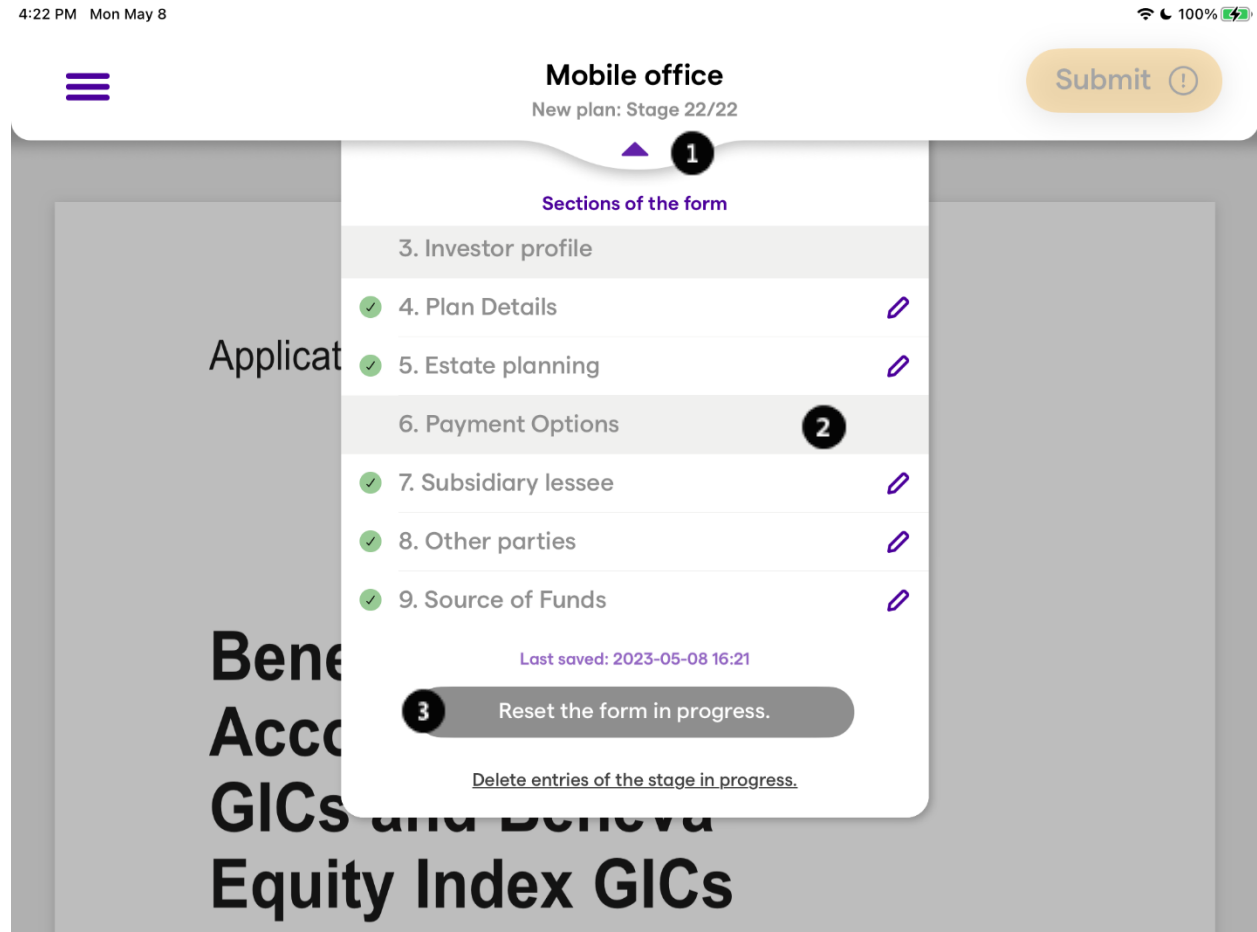
☰**Mobile office**
Deposit: Stage 1/21Next >

Initial Questions


<p><small>*Language</small></p> <p><input type="checkbox"/> Français <input checked="" type="checkbox"/> English</p> <hr/>	<p><small>*Contractholder's last name</small></p> <p>Client</p> <hr/>	<p><small>*Contractholder's first name</small></p> <p>My</p> <hr/>
<p><small>Contractholder's Social Insurance No.</small></p> <p>Social Insurance No.</p> <hr/>	<p><small>*Does the contractholder agree to receive a copy of this form as a secure email attachment?</small></p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <hr/>	<p><small>*New savings client?</small></p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <hr/>
<p><small>*Contract or client number</small></p> <p>12345678 ?</p> <hr/>	<p><small>*Type of form</small></p> <p>Existing plan v</p> <hr/>	<p><small>*Operation</small></p> <p>Deposit v ?</p> <hr/>
<p><small>*Do you want to complete a Profile Selector form with this application?</small></p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No ?</p> <hr/>		

Going back

You can access the *Stages menu* at any time to go back to a completed *Stage screen*.



- 1 Click on *Stage X/X* to display the *Stages menu*
- 2 Click on a *Stage* to go back to view or modify
- 3 Click on *Reset the form in progress* to delete all entries in the form

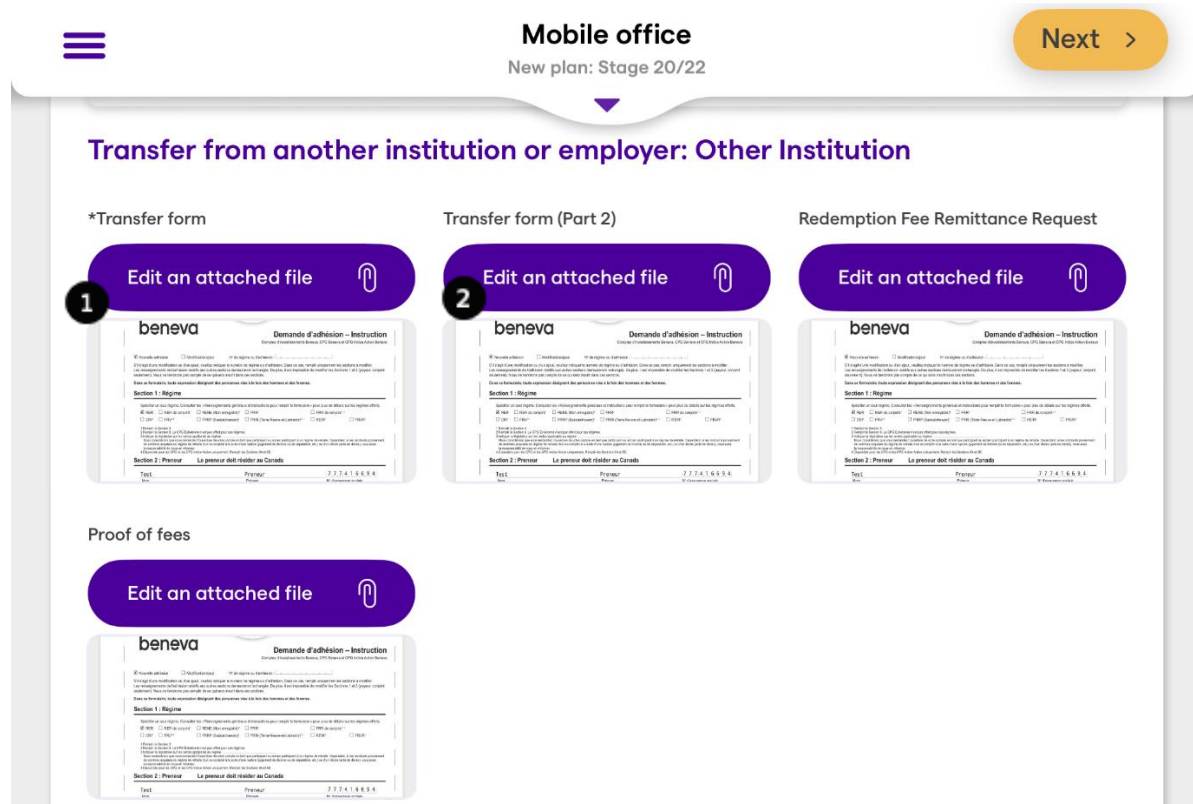
 When you go back to a *Stage screen*, information you have entered will not be lost. All you do is click *Next* at each *Stage screen* to return to where you were.

Your entries are continuously being saved so you never have to save the form. If you log out of the application or begin a new form, the incomplete form is saved as is.

Adding attachments to a transaction

Attachments are added from 3 different sources: camera, photo library, and files.

The attachments that can be added are limited to those indicated. There is no option to add an attachment of the user's choice. **If photos are used to submit other information, those will not be taken into account.**



- 1 An asterisk indicates if a supporting document is mandatory. If a mandatory supporting document is not attached, the application will not submit the transaction.
- 2 When a supporting document is larger than one page, such as a *Transfer* form, another space is provided for adding the second page.

If you need to submit other documents pertaining to a transaction submission, you may do by using the *Write to Us* function on our Beneva secured website for investments, accessed through the Beneva Log in portal (www.beneva.ca/en/iifs-brokers). You may also send them by mail to Beneva, at the address below, **with a note indicating that the enclosed documents are for a Mobile Office submission. Also include the contractholder's full name, date of birth and client or contract number**, so that we can match the document to the request.

Beneva Inc.
c/o Savings and Investments
P.O. Bos 10510, Station Sainte-Foy
Québec (Québec) G1V 0A3

Signing the form

Client signatures on forms are mandatory. If the client has not refused the Limited Trading Authority form, the client's signature is optional in accordance with the permitted transactions and operations. It is the advisor's responsibility to obtain the client's signature when required.

Signature types

The screenshot shows a mobile application interface titled "Mobile office" with a subtitle "New plan: Stage 21/22" and a "Next >" button. The main content area is titled "Signature information" and contains the following fields:

- *Signature: A dropdown menu with "In person" selected.
- *Place where the form signed: A text input field containing "Quebec".
- *Province: A dropdown menu with "Quebec" selected.
- *Last name of the witness: A text input field containing "Joe".
- *First name of the witness: A text input field containing "Advisor".
- *Does the client refuse to authorize the advisor to make transactions on his behalf in this account?: A question with two radio button options: "Yes" (unchecked) and "No" (checked).

- Remote signature (OneSpan)
- In person

Remote signature:



If for the selected transaction a Limited Trading Authority form is already on file for the client or if the client's signature is optional (eg. change of address), the choice of remote signature will not be available.

Please note that the client's email address is required to use the remote signature option.

Types of authentications

The screenshot shows a form titled "Information about signatories" with a "Submit" button. Under the heading "My Client", there are two fields: "*Email" with the value "myclient@email.com" and "*Authentication" with a dropdown menu. The dropdown menu is open, showing two options: "1 By secret code" and "2 By text".

- 1 Secret code:** A minimum 6-character 6 character minimum code is required. You must share the secret code with your client.
- 2 Text:** The client will receive a verification code via a text message directly to their registered cell phone number.

The screenshot shows the same form with the "*Authentication" dropdown menu set to "By secret code". A new field, "*Secret code", has appeared with the value "Mycode".

The screenshot shows the same form with the "*Authentication" dropdown menu set to "By text". A new field, "*Mobile phone", has appeared with the value "Mobile phone".



Once the transaction is submitted, you can see the pending request under the awaiting remote signature tab.

The screenshot shows the 'Mobile office' interface. At the top, it displays 'John Advisor' with 'Code: 123'. Below this are three tabs: 'Incomplete', 'Pending' (which is selected), and 'Sent'. Under the 'Pending' tab, there are two sections: 'Awaiting remote signature' and 'Awaiting transmission'. The 'Awaiting remote signature' section contains the text 'No document awaiting signature.' The 'Awaiting transmission' section contains 'No document pending transfer'. On the right side, there is a 'Reserved for Advisor Use' section with a form containing the following fields:

Last name of advisor	First name of advisor
Advisor	John
Name of general agent	General agent code
Beneva	1234
Work tel.	Ext.

The contractholder, and if required, the spouse will receive an email inviting them to sign the request.



Hello My Client,

As discussed, please sign the documents related to your transaction.

Click on the following button to access your documents on our signature platform:

1 Access your documents

Please note that an electronic signature has the same legal value as a handwritten one.
This notification was automatically generated by an e-mail address which is not monitored.
Please do not reply.

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If there are one or more irrevocable beneficiaries in a file, the transaction must be made face-to-face or on paper format. The remote signature tool is not available for irrevocable beneficiaries.

An authentication screen will open, and the client will need to enter their secret code or text message code.

Secret code:
beneva



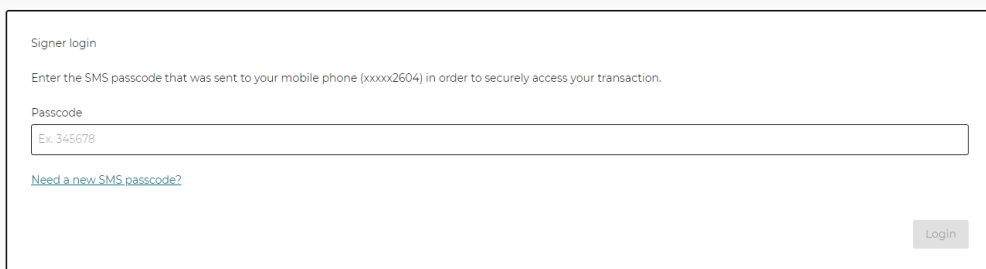
Signer login

Please answer the security question(s) below.

What is the secret code provided by your advisor?

Login

Text code:
beneva



Signer login

Enter the SMS passcode that was sent to your mobile phone (xxxx2604) in order to securely access your transaction.

Passcode

[Need a new SMS passcode?](#)

Login

The client will then be able to view the document.

Fields requiring a signature are identified by an "X";

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Section 10: Authorizations and signatures – Contractholder and Other Parties

Contractholder's Declaration (signature of Contractholder is mandatory)

I acknowledge receiving, as a Contractholder, a copy of the document entitled investment accounts Facts for each of the investment account selected, a copy of this duly completed form, the Annuity Contract (including the Key Facts) and any of its amendments, where applicable, under which I wish to make investments and I understand the general terms and conditions of the investment vehicles I have selected.

I acknowledge that my advisor instructed me to refer to investment accounts Facts for information about the investment account selected. I also acknowledge receiving the duly completed analysis of my financial needs when required by regulations.

In the case of the purchase of an Equity Index GIC, I confirm that I have been informed of the characteristics of the product, including the indexed and fixed participation rates.

I also acknowledge having read the terms and conditions applicable to this contract and agree to them.

I request that Beneva Inc. file an election with the Minister of National Revenue to register the contract as a TFSA under the section 148.2 of the Income Tax Act.

I authorize Beneva Inc. to use the information provided in this application form for administrative purposes, with the exception of my social insurance number (SIN) which may only be used for tax purposes. I authorize Beneva Inc. to verify my identity, when required by law, using an independent and reliable piece of identification and/or any other means permissible under the law. I also acknowledge having read the contract notice concerning records and personal information and have kept a copy of this duly signed application form.

I acknowledge having read the present declaration and the general information on this application form, having understood its terms and conditions and have had the opportunity to seek advice.

I certify that my signature, if affixed electronically, has the same legal value as my handwritten signature. Any reproduction of this application form whose integrity is ensured has the same legal value as the original.

Debit Authorization and Rights to Reimbursement (the signature of the bank account holder is mandatory)

By signing, I acknowledge having read and accepted the Authorization and the Rights to Reimbursement provided on the next page.

Signed at _____

City _____ Province _____

X Signed by _____ My Client _____
on their behalf Please print name [Y, Y, Y, Y | M, M | D, D]
Date

1 Other signature (where applicable) _____
Please print name [Y, Y, Y, Y | M, M | D, D]
Date

Please confirm to complete signing **Confirm**

- 1** The client must click on the "X" field to sign.
- 2** The client then clicks on the Confirm button to exit the document.

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Thank you, My Client

Signing complete! You may now view or download your signed documents.

We have everything we need at this stage and you may close this window.

[Review Documents](#)

[Quitter / Exit](#)

Reception of the signed document from the client to the advisor

An email will then be sent to you, inviting you to sign the documents.



Hello Advisor Joe,

As discussed, please sign the documents related to your transaction.

Click on the following button to access your documents on our signature platform:

Access your documents

Please note that an electronic signature has the same legal value as a handwritten one.

This notification was automatically generated by an e-mail address which is not monitored. Please do not reply.

beneva

The advisor will not need to authenticate again or answer security questions.

beneva

Welcome, [Advisor Joe](#)

As part of this transaction, you will need to perform the following tasks.

Your progress will be automatically saved. You may close this window at any time and come back using the link you have been provided.

Review Documents

We have documents for you to fill out, sign or acknowledge.

To Do	INSTR_356797B5-8F1B-483B-BE79-81639AD5F459
-------	--

[Get Started](#)

Fields requiring a signature are identified by an "X";

Done

beneva

Section 11: Authorizations and signatures - Financial Security Advisor

Financial Security Advisor's Declaration (signature of advisor is mandatory)

I accept the mandate that the investor has entrusted me with and I agree to act at all times in accordance with the Contractholder's instructions.

I certify having given the Contractholder a copy of the document entitled investment accounts Facts for each of the investment accounts selected, a copy of this completed form, the Annuity Contract (including the Key Facts) and any of its amendments, where applicable, under which the Contractholder wishes to make investments and I have explained the terms and conditions of the contract, Information Folder plan and investment vehicles selected by the Contractholder.

I also confirm that when required by law I have given Contractholders the duly completed assessment of their needs.

I have informed the Contractholder of names of the companies I represent, that I receive compensation for the sale of life insurance company products, of the possibility I may receive additional compensation in the form of bonuses, conference programs or other incentives, of any conflicts or potential conflicts of interest.

I certify that the Contractholder's signature was affixed by the Contractholder.

I certify that my signature, if affixed electronically, has the same legal value as my handwritten signature. Any reproduction of this application form whose integrity is ensured has the same legal value as the original.

Roy Finances **Advisor Joe**
Dealer's name (agency) Financial security advisor's name

Fund/SERY or Advisor Code (if applicable) Dealer Advisor Agency No. Advisor No. Reference market or affinity group (if applicable)

I do not have an advisor code. This is my first application.

Signed at City Province Date

X Signed by
A Advisor Joe

Debit authorization

I authorize Beneva Inc. to debit my account according to my instructions, for pre-authorized and/or occasional or sporadic amounts or those specified in Sections 6 and 7 and/or to deposit the fixed or variable amount based on the options selected in Sections 6C/6E, at the frequency selected in Section 6B.

I authorize Beneva Inc. to change the amount to be debited from my account and/or to be deposited in my account at my request.

I authorize Beneva Inc. to invoice me and debit any charges from my account if the pre-authorized debit payment cannot be processed as stipulated in this agreement.

Please confirm to complete signing **Confirm**

When all signatures are completed, the transaction will be in the Sent section.

10:48 AM Tue May 9 Not Charging

Advisor Joe
Code

Incomplete Pending **Sent**

Sent

2023-05-09
My Client
New plan - TFSA - Tax-free savings account

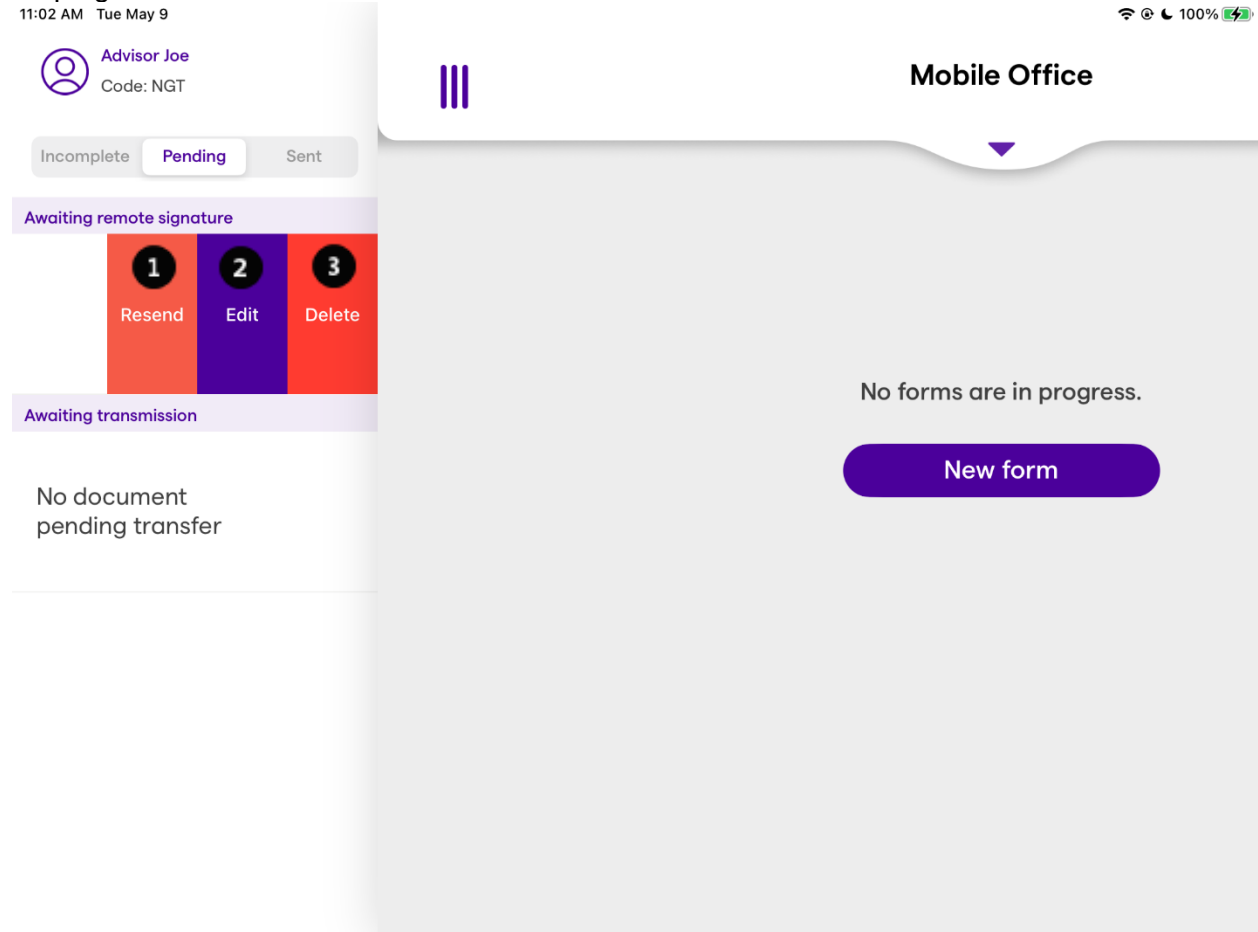
No forms are in progress.

New form

Delete the list

Transactions awaiting remote signature

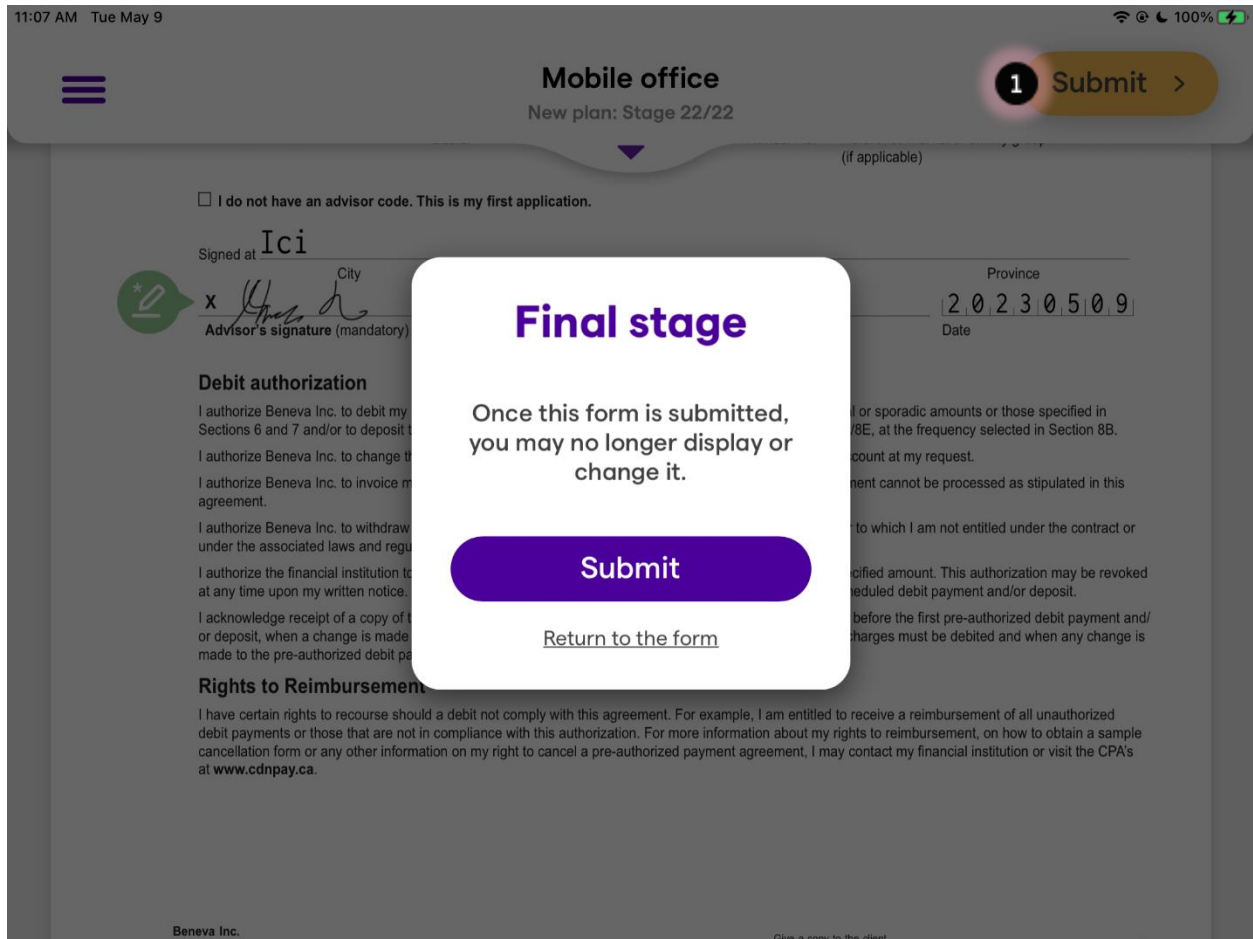
When you view a request awaiting remote signature, you have 3 options available to you by swiping left:



- 1 Resend the remote signature:** presents the signatories information again in the following situations:
 - Wrongly entered code or password (locked signature request)
 - Changing a signatory's information
 - Return a request, without changes, when a client refuses upon first receipt
- 2 Edit a transaction:** Changing an existing application moves it to the incomplete tab.
- 3 Delete a transaction:** The client no longer wishes to continue the transaction.

Submitting a request

When all signatures are obtained, the *Submit* button turns to dark yellow indicating it is activated.

A screenshot of the 'Mobile office' app interface. The top status bar shows '11:07 AM Tue May 9' and '100%' battery. The app header includes a hamburger menu, the title 'Mobile office', and a 'New plan: Stage 22/22' indicator. A prominent yellow 'Submit' button with a '1' icon is in the top right. The background form is partially obscured by a white dialog box with a purple border. The dialog box contains the text 'Final stage' in purple, followed by 'Once this form is submitted, you may no longer display or change it.' and a large purple 'Submit' button. Below the dialog box is a link that says 'Return to the form'. The background form includes fields for 'Signed at' (Ici), 'City', 'Province' (20230509), and 'Date'. There are also sections for 'Debit authorization' and 'Rights to Reimbursement'.

1 Click *Submit* when the form is completed.

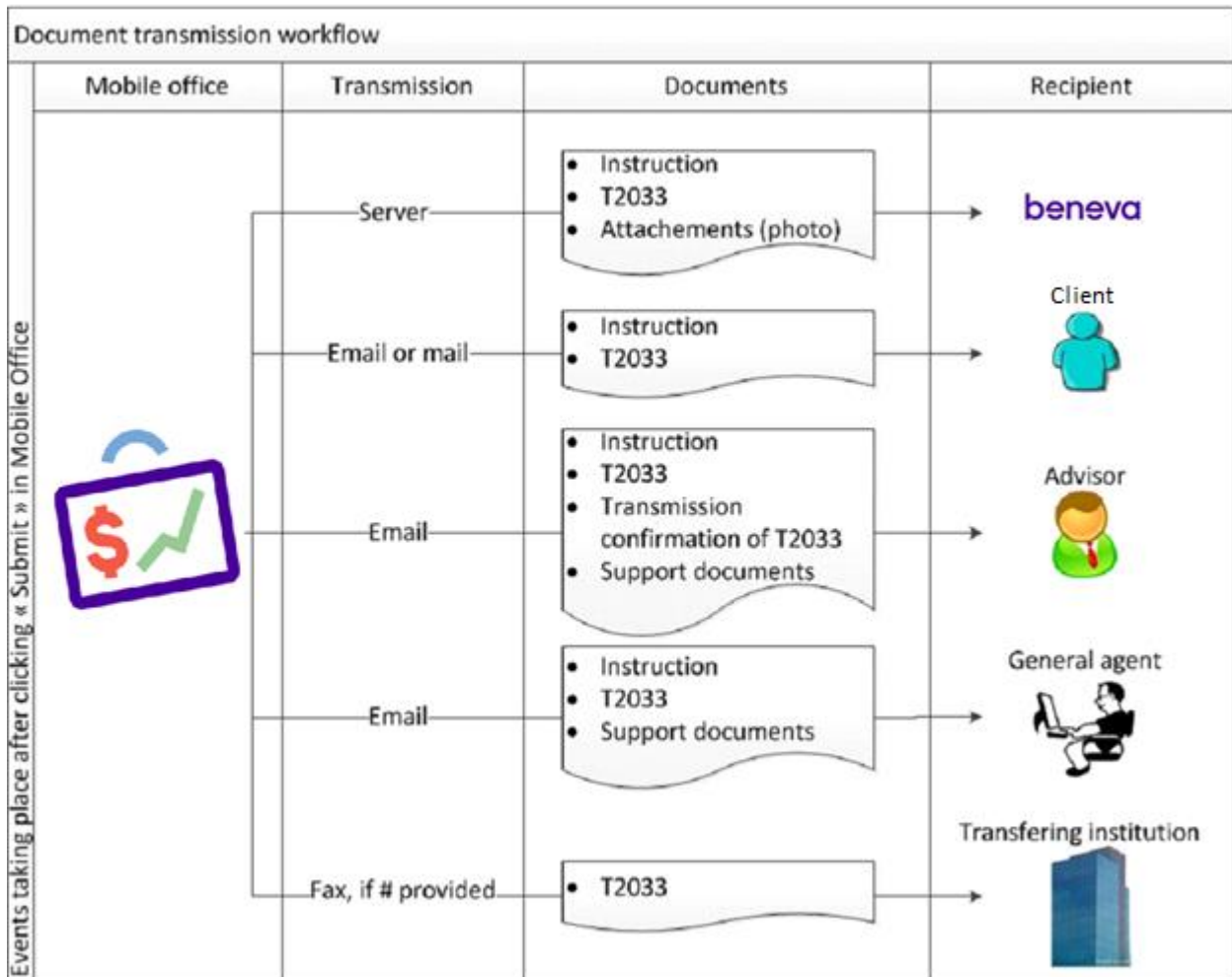
Once the form is submitted, you will no longer be able to view or change it. It will be saved on the iPad until it is sent.



The form is submitted when the iPad has internet connection and the Mobile Office application is open.

The document can then be viewed by accessing the password protected attachment in the email confirmation you have received.

Sending documents



Submitted forms can only be sent through the iPad when the Mobile Office application is open, and the iPad is connected to the internet.

To look up the status of submitted forms, go to the *View form status* section below.

Managing transfer request forms

T2033

The T2033 form is integrated within the *Mobile Office* and the process of sending forms is managed by the application. **If the transferring institution's fax number is provided, *Mobile Office* will automatically fax the form to this number. The advisor will then receive an email confirming whether or not the fax was sent successfully. Important! Note that the general agent receives the T2033 form but will not receive the confirmation email sent to the advisor.**

If the transferring institution's fax number is not provided, or if the advisor receives a message that the fax was not received due to a wrong number, it is the advisor's responsibility to send the form to the transferring institution, using a different method. The T2033 form is always sent by email to the advisor and their general agent.

Other transfer forms

The other transfer forms, such as T2151, are not integrated in the *Mobile Office* questionnaire, but can be accepted as photos. They will be automatically sent to Beneva's head office, **but it remains the advisor's responsibility to send the forms to the transferring institution.**

Password to open attached documents

All supporting documents sent by email to the advisor, client and general agent are password protected. To understand how passwords are created, please contact the technical support team at the following number.

8:00 a.m. to 5:00 p.m. ET Monday through Friday

Partners services

Phone: 1 877 707-7372

Email: brokerage.support@beneva.ca

View form status or edit profile

The screenshot shows the 'Mobile office' app interface at 'Stage 1'. At the top left, there is a circular icon with the number '1' and a three-line menu icon. At the top center, the text 'Mobile office' is displayed above 'Stage 1' and a downward-pointing triangle. At the top right, there is a yellow button labeled 'Next' with an exclamation mark icon. The main content area is titled 'Initial Questions' and contains several form fields:

- *Language:** Two radio buttons, 'Français' (unchecked) and 'English' (checked).
- *Contractholder's last name:** A text input field labeled 'Last name'.
- *Contractholder's first name:** A text input field labeled 'First name'.
- Contractholder's Social Insurance No.:** A text input field labeled 'Social Insurance No.'.
- *Does the contractholder agree to receive a copy of this form as a secure email attachment?:** Two radio buttons, 'Yes' (unchecked) and 'No' (unchecked).
- *New savings client?:** Two radio buttons, 'Yes' (unchecked) and 'No' (unchecked).
- *Do you want to complete a Profile Selector form with this application?:** Two radio buttons, 'Yes' (unchecked) and 'No' (unchecked), followed by a question mark icon.

- 1 To access the forms menu that are incomplete, pending transfer, sent or to enter a new form, click on the three-line menu icon in the upper left corner of any screen at any time.

This menu can also be used to begin a new form.

Forms menu

The screenshot displays the Beneva Mobile Office interface. At the top left, a profile card for 'Advisor Joe' is visible, with a 'Code:' field and a '5' in a circle. Below this are three tabs: 'Incomplete' (1), 'Pending' (2), and 'Sent' (3). The main content area shows a list of forms under the 'Incomplete' tab, with two entries for '2023-05-09'. The first entry is for 'My Client' (New plan — TFSA - Tax-free savings account) and the second is for '(new client)'. Below this is a 'Pending' section with 'No document pending transfer'. At the bottom, a purple button labeled 'New form' (4) is visible. On the right, a form titled 'Initial Questions' is shown, with fields for language (French/English), contractholder's last name, Social Insurance No., and consent checkboxes.

- 1

 - Incomplete forms are listed by the contractholder's name, the plan and the date of the most recent changes.
 - Incomplete forms can always be viewed and modified. This allows you to fill out several forms in advance, before meeting with your clients to complete signatures.
 - To delete them, select the form, click on the *Stages menu* and click *Reset the form*
 - For security reasons, never leave incomplete forms open on your iPad.
- 2

Pending forms are forms that have been submitted. They can no longer be viewed or modified. They will be transferred to Beneva once the iPad has internet connection and the Mobile Office application is open. If the form has been partially sent, the percentage sent is indicated.
- 3

Click *Sent* to consult the list of forms that have been transferred to Beneva. The date entered matches the date the form was sent.
- 4

Click *New form* to begin a new entry, but incomplete forms will be saved. This way, advisors can prepare several forms before meeting clients.
- 5

Click on your name to view or update your profile.

Deleting forms

Deleting an incomplete form

11:25 AM Tue May 9

Advisor Joe
Code: [redacted]

Incomplete Pending Sent

Incomplete

05-09
it
TFSA - Tax-free
account

2023-05-09
(new client)

Pending

No document
pending transfer

New form

Mobile office
Stage 1

Initial Questions

*Language
 Français English

*Contractholder's last name
Last name

*Contractholder's Social Insurance No.
Social Insurance No.

*Does the contractholder agree to receive a copy of this form as a secure email attachment?
 Yes No

*New s
 Y

*Do you want to complete a Profile Selector form with this application?
 Yes No ?

- 1 Left-swipe the entry and press *Delete*

Deleting an active form

- Open the form
- Click on the *Stages menu*
- Click on *Reset the form in progress*

Terms of Use

1. Notice

These Terms of Use govern the use of this Mobile Application (the “Application”) by Beneva Inc. and its subsidiaries (“Beneva”). The user acknowledges having read these Terms of Use and agrees to be bound by them when accessing, downloading and using the Application, so the user has to read them carefully. In fact, by using the Application, the user accepts the conditions stipulated by Beneva for such purposes and undertakes to respect them. The terms and conditions of the contract concluded between the user and Beneva also apply. Beneva reserves the right to modify these terms of use at any time and without notice.

2. Protection of personal information

Beneva attaches great importance to the protection of Personal Information provided by users through the Application. To learn more about our practices, we invite you to consult our [*Personal Information Privacy Statement*](#).

In addition, the user agrees to have obtained the consent of the clients to the collection, use and communication of his personal information.

The user is also responsible for informing customers of these terms of use, particularly with regard to aspects related to the protection of personal information.

3. Exclusion of liability

Beneva is committed to taking the measures necessary to ensure that the information contained on the Application is as reliable as possible.

However, Beneva cannot ensure that this information is always accurate and current. Without limiting the foregoing, Beneva relieves itself of any responsibility with regard to the accuracy of the information provided on the Application.

Moreover, Beneva may not be held liable for damage of any type whatsoever arising, directly or indirectly, from the use or operation of the Application and the information that it contains. The use of this Application is subject to the user's acceptance of these conditions.

4. Availability of the Application and user responsibilities

Beneva cannot ensure that the Application will be available, that it will meet the user's requirements, that access to it will not be interrupted, that there will not be delays, failures, errors, omissions or losses of information transmitted, that no virus or other contaminating or destructive element will be transmitted and that no damage will be caused to the user's mobile device or computer system. Beneva also reserves the right to modify the service provided by the Application at any time and without notice.

Although Beneva takes all reasonable measures to protect personal and confidential information, such as protecting the transmission of information and making it inaccessible to other Applications in order for the user and clients to be protected against hackers or snoopers, Beneva is unable to absolutely guarantee the confidentiality of information transmitted by means of the Application. User therefore acknowledges that Beneva cannot ensure the confidential nature of their transactions, particularly in a situation where a non-secure device or connection is used to carry out a transaction by means of the Application.

Beneva is not responsible for any damages or harm a user may incur in such a situation. Furthermore, user is responsible for ensuring the protection of data and personal information entered by means of the Application and the security of its devices. In this regard, to minimize the threat of a confidentiality or security incident associated with use of the Application, Beneva recommends that user has access to its device password protected, sets its device to lock automatically after a short period of inactivity and refrains from leaving its device turned on and unattended.

5. Use of Codes, transactions and signatures

To access the Application services, user will be asked to enter user codes, specifically advisor's codes, managing general agent's codes and codes provided by the manufacturer of the device used (the Codes). In such case, the user alone is responsible for keeping the Codes confidential. The user must therefore immediately inform Beneva if he believes that his User Codes and/or his password have been lost, stolen or have been the subject of unauthorized use. User acknowledges that Beneva is not liable by any means whatsoever for any loss or damage arising directly or indirectly from a transaction carried out in response to a request made by someone using the Codes.

By using the Application, user acknowledges that any electronic signature by him constitutes its original signature. User also acknowledges that using the Codes is equivalent to signing. Furthermore, user acknowledges that checking a box and/or clicking OK, Send, Accept, Transmit and Submit or any such message is equivalent to its acceptance.

In addition to the above, user agrees to have clients verify the accuracy of the information entered on the Application forms before they are transmitted to Beneva by means of the Application. User also acknowledges that clients' signature is only to be obtained in its presence and that the entry of a client's signature constitutes the affixing of the client's distinctive mark. Lastly, user agrees to inform clients that their electronic signature entered by means of the Application constitutes their original signature.

6. Loss of theft of a device

The user agrees to, immediately on becoming aware of the loss or theft of a device on which the Application is installed, notify Beneva.

Partner services: 1 877 707-7372

7. Application updates

Beneva may at any time ask user to update its Application, requiring an Internet connection. The user agrees to install any Application updates made available and understands that they are necessary for use of the Application.

8. Internet connection

An Internet connection is necessary in order to download the Application and its updates and to transmit completed forms by means of the Application. User acknowledges that the security of its Internet connection cannot be guaranteed nor verified by Beneva. Beneva is not responsible for any damage a user may incur in such a situation. User is therefore responsible for ensuring that he is using a secure Internet connection when downloading the Application and/or its updates and when using the Application.

9. Unauthorized copies

User acknowledges that they may not make or keep any copy of the information entered in the Application and on forms, whether the copies are made on their device, on paper or in electronic format. Therefore, the only copies of the information entered in the Application and on forms to which the users have access are those that will be transmitted by email, generated by the Application and made available by the Application for consultation.

10. Incomplete forms

To ensure the protection of data entered by means of the Application, user agrees to refrain from keeping any incomplete forms for longer than three months and to destroy such forms at the end of the three-month period.

11. End of a business relationship

User acknowledges that once its business relationship with Beneva has come to an end for any reason whatsoever, the user has to refrain from transmitting complete forms to Beneva by means of the Application.

12. Copyright and trademarks

All information provided on the Application is protected by copyright legislation. The redistribution, reproduction, copying, publication, storage, modification or other such use of the information provided on the Application without the prior written authorization of Beneva is strictly prohibited. Application user may use this information only for personal purposes and while carrying out its functions or duties.

All product, service and company names provided on the Application are trademarks of Beneva. Any use thereof without the written authorization of Beneva is strictly prohibited.

13. Applicable laws

These terms of use for the Application are governed and must be interpreted in accordance with the laws in effect in the province of Quebec, Canada, regardless of its provisions regarding conflicts of laws.

All rights that have not been expressly granted herein are reserved. Any provisions of these terms determined to be invalid or not applicable by law does not invalidate the other provisions, which remain in force. These terms of use constitute the entire agreement between you and Beneva with regard to the use of the Application, and takes precedence over all prior agreements that may have been entered into with regard to the content on this Application.

14. Questions? Comments?

User may contact Beneva if he has any question concerning usage of the Application.
Partner services: 1 877 707-7372

15. Rights reserved

All rights that have not been expressly granted herein are reserved.