iA CAMPUS

FNA DELIVERY PROCEDURE

Sending a passwordprotected PDF and indexation in Client Manager

Because of the speed at which contracts can now be delivered, you are now required to deliver the **FNA** to the client **at the same time** the insurance or annuity transaction is signed, where applicable.

In addition, to help you show that you have adequately met your obligations, the **proof that you have delivered the FNA to the client** must be added to the client file **within the three business days** following completion of a transaction.



Installing PDFCreator and creating a custom profile

Important

In order to protect your PDF files with a password, you need to install **PDFCreator** and create a custom profile.

To achieve that, follow the <u>Using PDFCreator to password-protect a document</u> procedure available in *iA Connected*, at the bottom of the *Procedures and FAQ* page, in the *Career network* section.

If you have already installed PDFCreator and created a custom profile, continue to the next page of this procedure.



Downloading the FNA

1. Using Équisoft/Plan or My Financial Journey, download the FNA report in PDF format.



Protecting the FNA PDF with a password

- 1. Open the FNA report in PDF format on your computer using a software such as *Acrobat Reader*. Make sure it's opened in the reader, and not in your internet browser.
- Open the print window by going to *File > Print*, by clicking the *printer icon* in the shortcut bar or by using the keyboard shortcut *CRTL+P*.



- 3. Choose *PDFCreator* as the printer and click on the *Print* button.
- **4.** In the PDFCreator window, select the following elements:
 - a. Choose the *profile* that you previously created;
 - b. Choose the directory in which to save the new PDF with the ... button;
 - c. Then, click Save.

Important

The requirements for iA passwords security are the following:

- **1.** A minimal length of 12 characters.
- **2.** A minimum of 3 of the 4 following requirements:
 - **a.** At least one uppercase letter;
 - **b.** At least one lowercase letter;
 - c. At least one number;
 - **d.** At least one special character.
- 3. Do not use the same password for each sending.
- 4. Do not choose and obvious password, such as the client's name.

Relay the password verbally or by text to the client.

- 5. Enter the *Owner* and the *User* passwords:
 - **c.** You must enter *two different passwords* in order for the person with the User password to be able to read the file without being able to modify it.

NOTE

The *Owner password* allows the person that has it to modify the file. The *User password* only allows the person that has it to read the file.

6. Click *Ok* to complete the creation of the PDF.





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Emailing the FNA using the template available in Client Manager and automatically transferring it as a Completed activity.

- **1.** In the in the top-right corner of the General tab of the Client's file, click on the arrow in the green box.
- 2. In the dropdown menu, click on *Generate Email Merger*.
- 3. Confirm the language and select the *FNA Delivery* template.
- 4. Click *Ok*.

Enter the email's sub	ject.
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6. Add the password-protected FNA report as an attachment.

NOTE

Don't forget to add your **signature**.

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- 7. At the bottom of the page, make sure:
 - **a.** In the *Linked to* box, the client is selected in the *Contact* field;
 - In the Action box, in the Transfer to activity section, the Completed dropdown is set to Public;
 - c. In the same section, for the *Create Document File* field, the dropdown is set to *No*;
 - **d.** Under *Completed*, your name is selected as the *User*.

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NOTE

If your name doesn't appear next to **User**, click on the word **Admin** next to the **User:** label, then **Edit** (pencil), **Show all**, select your name and click on **Admin** to remove it from the list.

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8. Send the email.

NOTE

The email is added automatically to the *Completed* section of the *Activity* tab.

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NOTE

The proof of sending of the FNA by email is added to the *Internal notes* section and will not be able to be modified after 30 days.

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