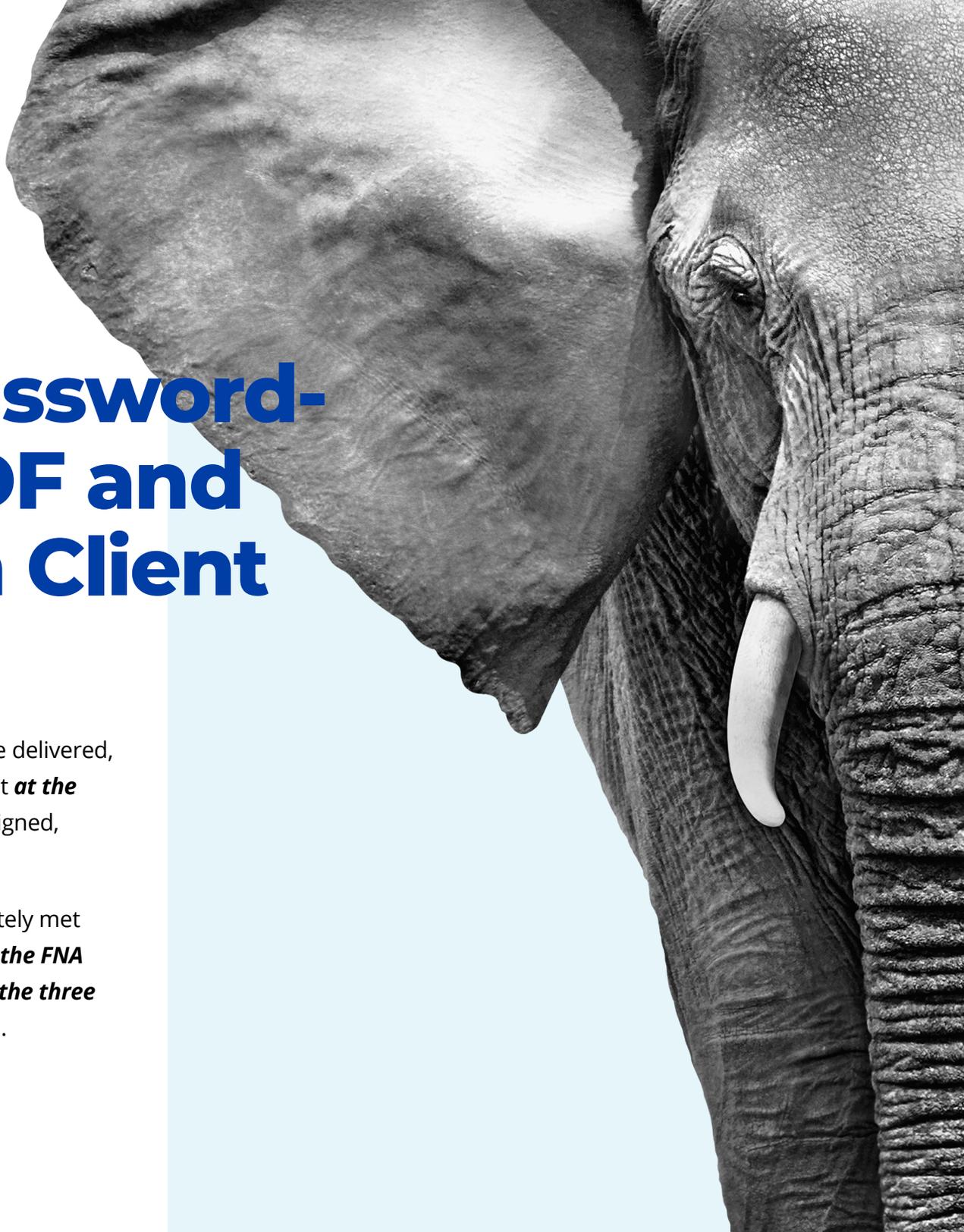


FNA DELIVERY PROCEDURE

# Sending a password-protected 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.



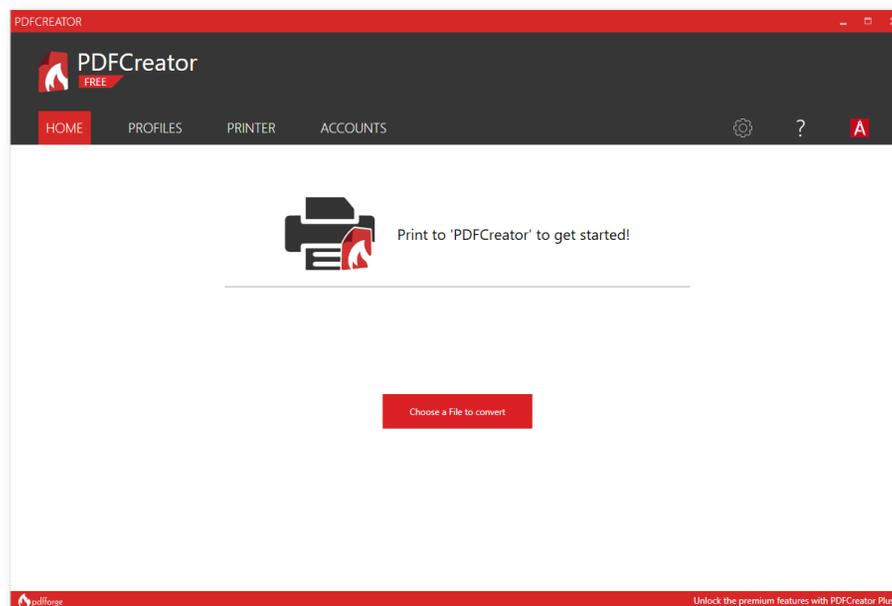
## Installing PDFCreator and creating a custom profile

### Important

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

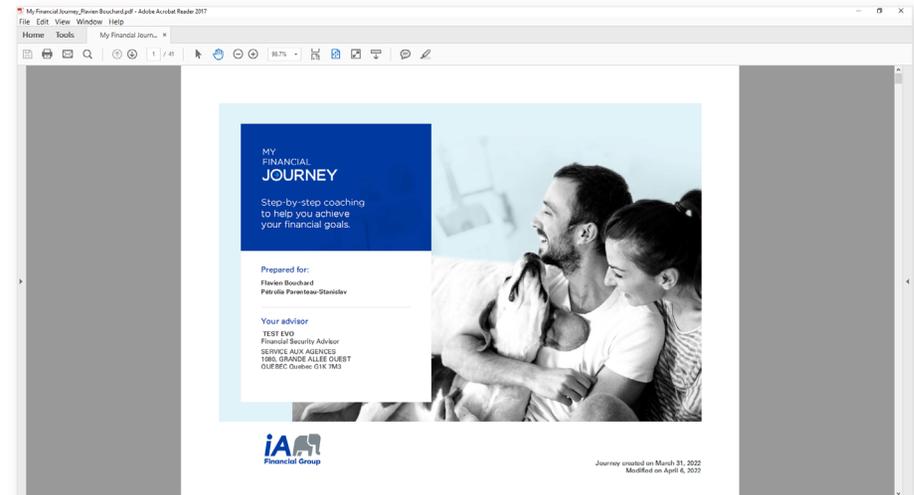
To achieve that, follow the [Using PDFCreator to password-protect a document](#) procedure available in **IA Connected**, at the bottom of the **Procedures and FAQ** page, in the **Career network** section.

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



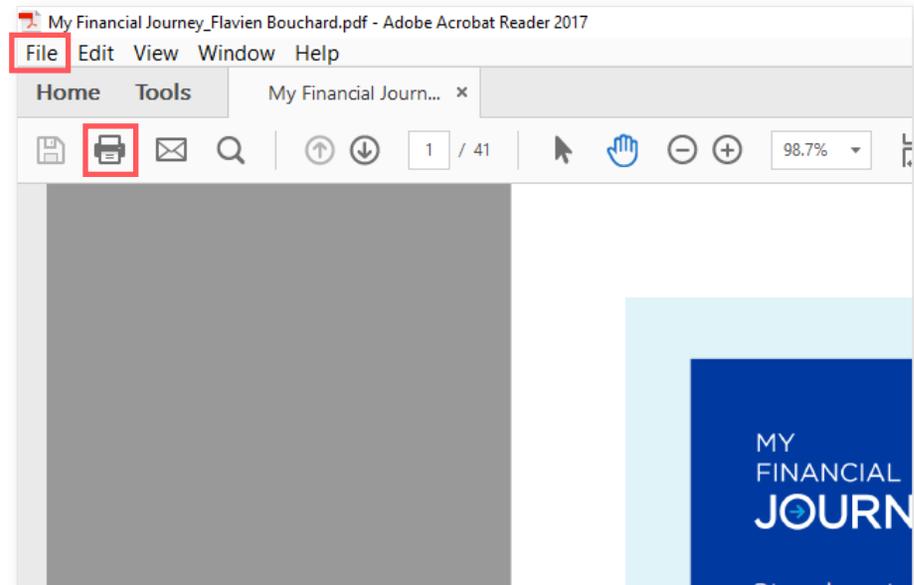
## Downloading the FNA

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.
2. 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:

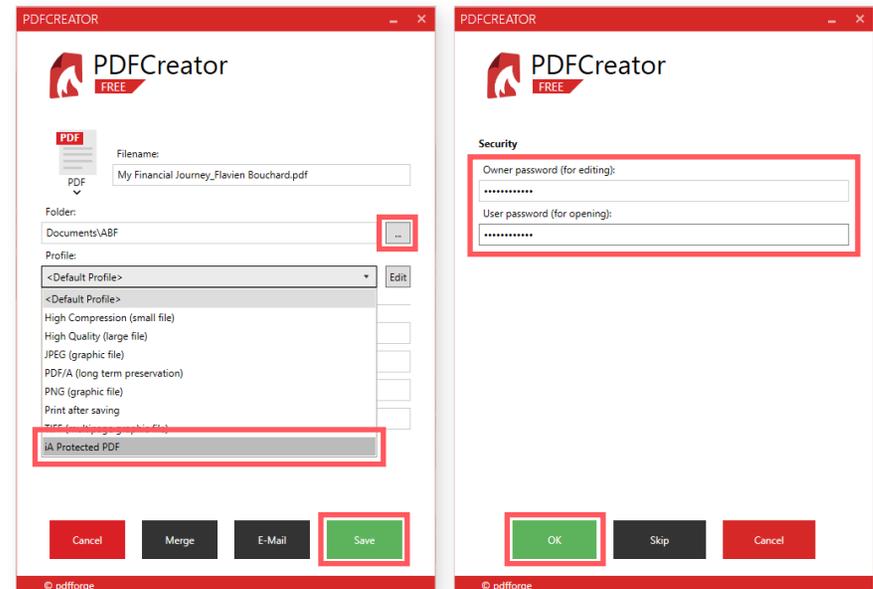
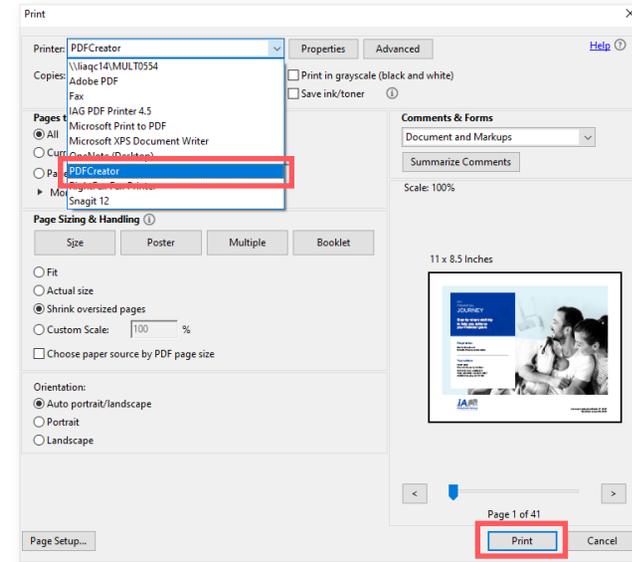
1. A minimal length of 12 characters.
2. A minimum of 3 of the 4 following requirements:
  - a. At least one uppercase letter;
  - b. At least one lowercase letter;
  - c. At least one number;
  - d. At least one special character.
3. Do not use the same password for each sending.
4. Do not choose an 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:
  - a. 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

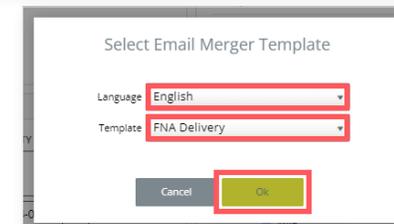
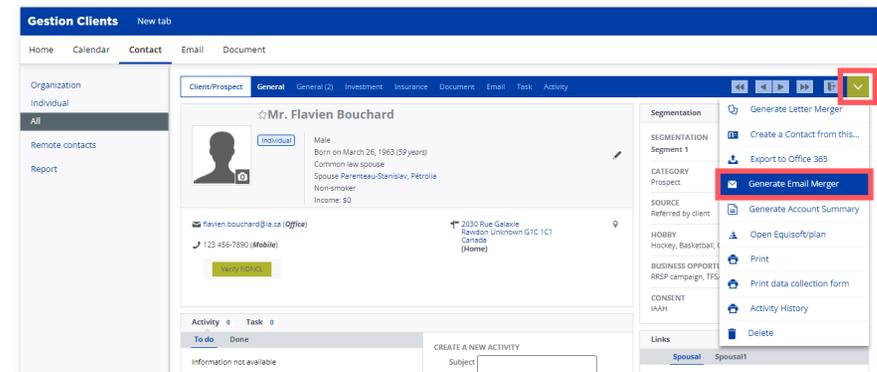
The **Owner password** allows the person that has it to modify the file.  
The **User password** only allows the person that has it to read the file.

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

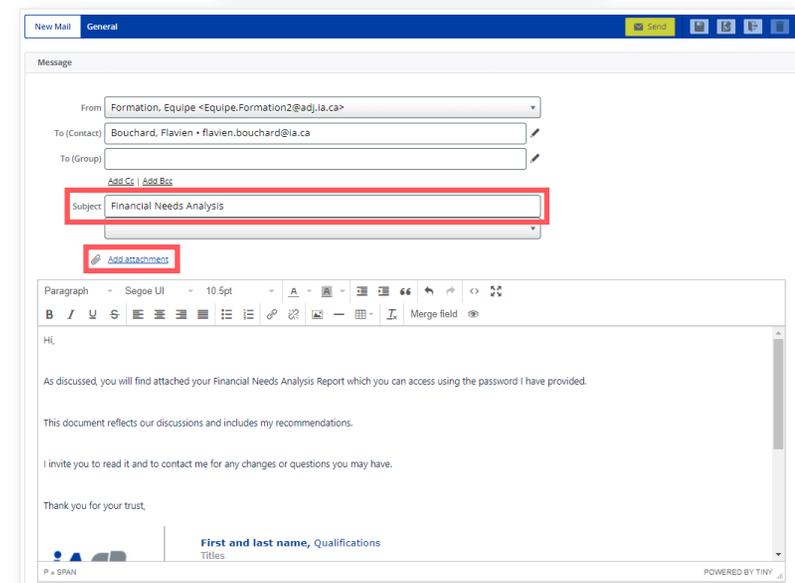


## Emailing the FNA using the template available in Client Manager and automatically transferring it as a Completed activity.

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**.



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



### NOTE

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

7. At the bottom of the page, make sure:

- a. In the **Linked to** box, the client is selected in the **Contact** field;
- b. 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**.

The screenshot shows two panels: 'Linked to' and 'Action'. In the 'Linked to' panel, the 'Contact' field is highlighted with a red box and contains the text 'Bouchar, Flavien • 123 456-78'. In the 'Action' panel, the 'Completed' dropdown is highlighted with a red box and set to 'Public'. Below it, the 'User' field is highlighted with a red box and contains 'Formation 2. Equipe'. The 'Create Document File' dropdown is set to 'No'.

**NOTE**

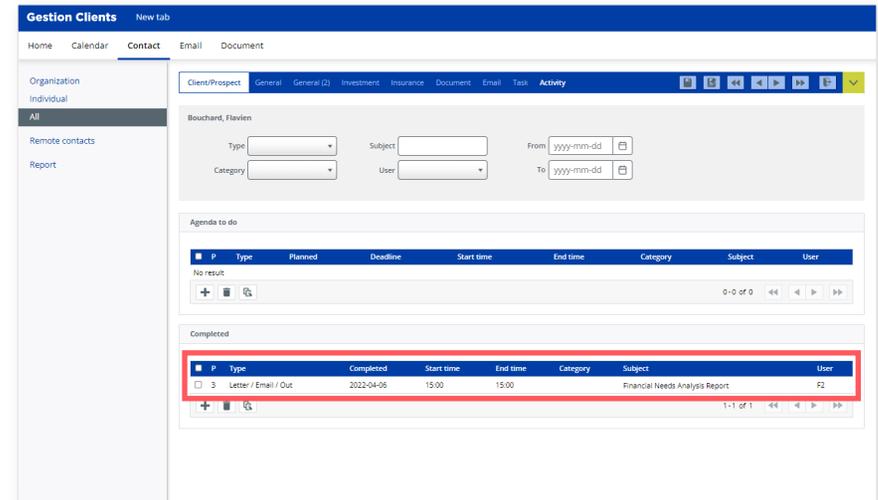
If your name doesn't appear next to **User**, click on the word **Admin** next to the **User:** label, then **Edit** (pencil), **Show all**, select your name and click on **Admin** to remove it from the list.

The screenshot shows a close-up of the 'Completed' section. The 'Completed' dropdown is set to 'Public'. Below it, the 'User' field is highlighted with a red box and contains 'Admin'. Below the 'User' field, there are 'Show all' and 'Close' buttons. The 'Show all' button is highlighted with a green box.

8. Send the email.

**NOTE**

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



**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.

