For iA Product Suite

How to Download Interface Suite Software

•Go to www.ia.ca
•Click the **Connect** button in the top right hand corner, then click **Advisor Centre**
•Click on Download Interface, you will now be in the installation section
•Select English and click OK
•Click next on the "Welcome to the InstallShield Wizard Interface Suite" screen and on the "Interface Suite New Features" screen
•Click on "I accept the terms of the license agreement" and then click next
•**IMPORTANT** - Choose **English** and **Vancouver** as service centre
•Select Standard (recommended) as your installation type, click next, and then click install
•Select "Yes, I want to restart my computer now," and then click Finish

How to Register for the Advisor Centre

•Go to www.ia.ca
•Click the **Connec**t button in the top right hand corner, then click Advisor Centre
•Click on "Need a secure access?" at the bottom of the secure access section on the right-hand side of the page
•Complete & Fill in each field, noting the postal code is your home postal code not your office postal code), then click continue. If you have a **corporation** you must contact IT directly to get registered (interface@ia.ca)
•Type your Email address (this will be your access code), create a password and set up your security questions, then click I accept the terms of use, and click continue
•Your account has now been successfully created
•If you need Technical Support contact 1-888-610-5101 or interface@ia.ca

First EVO Sale

•Launch the Interface Suite software from the icon on your desktop
•On homepage of Interface Suite click on the **Insurance** heading
•Click on the product you wish to sell, then click the "Launch" button on the right side
•Complete the illustration
•At the end of the illustration click on **EVO** button, and you will be brought into EVO application software
•Be sure to go into

and complete Advisor Information and **YES** to activate electronic signature
•Continue with completing the information for the application
•Click on validate button (internet connection is not required up until this point)
•Enter your access code and password (same as Advisor Centre), and then click sign in
•Complete Electronic Signature via client's cell phone and email OR get wet signature on the F1EA signature form (available on the Advisor Centre – Document Centre)

IMPORTANT - Checking on your Application

•Go to www.ia.ca
•Click the Connect button in the top right hand corner, then click Advisor Centre
•In the secure access section enter your access code and password
•Click on **My Clients** tab
•Search by last and first name, contract number, my pending requirements, or my contracts in underwriting

R.E.S.P. Online Application Tool

• Log in to the Advisor Centre as described above
•Click **My Tools and Applications** and then **RESP New Issue Tool** in drop down menu
•Enter information in simple step by step process of the application
•Complete electronic signature and transmission to Head Office and your application is complete!
•Only exception to electronic signature is in the case of a **Transfer**. You can still complete the electronic application, however, you must print off the forms at the end of the process and obtain wet signatures