



# FAQ

## EVO Insurance on the web





## The new EVO Insurance

### What is EVO Insurance?

EVO Insurance is a sales platform for iA Financial Group's individual insurance products. Previously, you would download the platform to your computer, but now you can access EVO on the web.

### What's the difference between EVO Insurance and EVO Savings?

The new version of EVO Insurance is fully web-based and is accessible from the Advisor Centre (as is EVO Savings). No need to download application updates to your computer. Starting this fall, you'll have access to EVO anytime and on any device, as long as you have an internet connection.

### What's new in the web version of EVO Insurance?

- **Multiplatform web use:** Now available anywhere, anytime, on any device, starting fall 2025 (tablet and cell phone).\*
- **Enhanced experience with fluid, intuitive navigation:** Interface improvements, more frequent, real-time updates.
- **More secure environment:** The new version is now integrated into the Advisor Centre, providing a more secure environment and bringing all your work tools together in one place.

\* For security reasons, Career network advisors will need to go through the [Microsoft Intune administration center](#) to launch EVO Insurance on a tablet or cell phone. iA FLEXIBLE Working Model rules apply.

# Signing in

## How do I access the new version of EVO Insurance?

Launch the new version from your Advisor Centre site (in the **Tools** section of the home page, click on the **Launch EVO Insurance** link).



## Do I need to log in to my Advisor Centre site to launch the web version of EVO Insurance?

Yes, you have to log in to your Advisor Centre site. Integrating EVO into the Advisor Centre strengthens data security and brings all your work tools together in one place.

## Is there anything I should do when I first sign in to the web version of EVO?

Yes. When you log in for the first time, you'll have access to a virtual guide to help you through the new platform.

**You will need to select the same parameters (default values)** used in the downloadable version (province, commission rates, etc.).

## Why can't I access the web version of EVO Insurance?

The new web version of EVO Insurance is being deployed in phases. When your phase is rolled out, your access will be activated and you will be notified by email and in the **Important messages** section of the downloadable version. Don't hesitate to contact your manager if needed.

## Can an advisor who is not under contract with iA Financial Group use the web version?

No, the web version no longer allows the use of "guest" mode for non-registered advisors. An advisor must be under contract with iA and have a valid agent code to access the web version and sell insurance products. Make sure you are under contract before starting your sales applications.

## How do I get technical support for the web version?

When you log in for the first time, you have a virtual guide to change your default values, create a new illustration, share an application with a colleague, and more!

If you can't find the answers to your questions, you'll be directed to a help page in the Advisor Centre. You can either call 1-888-610-5101 or chat with an agent.



# Features



## What are the new features of the web version of EVO Insurance?

There are no new features for now, apart from interface and navigation improvements. For example, you can open several tabs at once, and you can use the virtual guide to help you explore the new platform when you log in for the first time. Also, when you submit a sales application in the web version of EVO Insurance, you will be redirected to the home page, where you can track the status of your application. You no longer have to wait for the transmission to be completed before performing other actions on the platform.

You can still:

- Create an illustration
- Get customized pricing
- Complete a declaration of insurability with the client
- Make changes online (beneficiary, address, etc.)\*
- Use the e-signature (with some exceptions)
- Get instant approval at point of sale for most clients

\* Electronic changes will be added to the web version in fall 2025, when it will be rolled out to all Career and brokerage advisor networks.

- In the meantime, you must continue to use the downloadable version to make electronic changes. Make sure you update your downloadable version throughout the transition period.
- You must also continue to use the downloadable version to submit your Access Life sales applications. Don't forget that many after-sales transactions can also be carried out directly in your Advisor Centre for Access Life.

Lastly, you will no longer have to download new versions of the application, since updates will be made online in real time.

You will be notified as new features become available.

# Features



## What products can I sell using EVO Insurance?

- Traditional life
- Universal life
- Specialized life
- Participating life
- Critical illness
- Access Life\*

\*Starting in fall 2025, you will be able to submit your Access Life sales applications directly in the web version (the product will be permanently removed from the Assure&go and downloadable EVO platforms).

The Life and Serenity 65 product has no longer been available for sale since November 15, 2024.

## Will all my sales applications be accessible at all times in the new version of EVO Insurance?

- **Sales you have not submitted** will stay on your dashboard for 2 years before being deleted.
- **Sales you've submitted** to head office will be deleted 15 years after the date of submission.

## Is it possible to collaborate with others in the new web version?

Just like in the downloadable version, we invite you to use the [case sharing](#) feature to collaborate with others.

Users who must use the web version but who don't have access to the Advisor Centre will be able to obtain access via the delegation tool. [See the procedure](#).

Note that this delegation does not give access to the sales data of the advisor granting the access.

# Download version discontinued

## Can I continue to use the downloadable version of EVO Insurance?

Yes, you will still be able to use the downloadable version if necessary. However, we strongly encourage you to become familiar with the web version and to start your sales there.

Once the migration is complete, we will inform you of the key dates regarding the discontinuation of the downloadable version.

## Will my sales applications be transferred automatically to the web version of EVO Insurance?

Sales applications that you have started and not transferred to the downloadable application **will not be transferred automatically**.

It is important to send those applications to the downloadable version and to use the web version of EVO for your new sales applications.

You'll still be able to download PDFs of the sales applications, illustrations and e-signature forms that you sent to head office.



THE NEW EVO  
INSURANCE

SIGNING IN

FEATURES

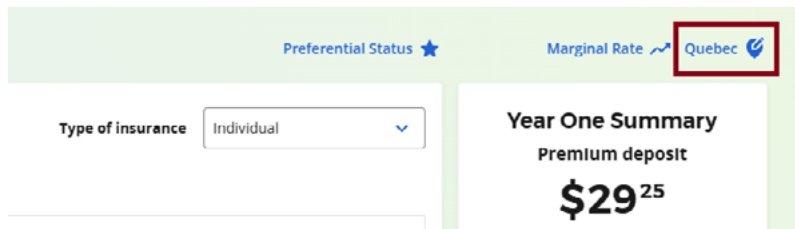
DOWNLOAD VERSION  
DISCONTINUED

OTHER QUESTIONS

## Other questions

### How to change the province in a sales application?

Click the geolocation icon located at the top right of your screen.



To set a default province, go to the **Illustrations Configuration** section in the **Settings** menu.





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