Print Reset

SSQ Financial Group

ADMINISTRATION FORM ADVISOR

☐ Creation ☐ Modification

General agent

General agent name | SSQ Insurance no. | SSQ Investment and Retirement no. (I&R)

Section A - Advisor information – to be completed for all advisors

SSQ Insurance no. (if applicable) | SSQ I&R no. (if applicable) | FUNDSERV advisor code (I&R only)

Name of advisor (as it appears on the licence) | First name | SIN (for tax purposes)

Business address (for I&R, note that this address will appear on clients' statements) | Date of birth (Y Y Y Y M M D D)

City | Province | Postal code

Email | Mail reception method[1] ☐ ICS ☐ Canada post | Gender: ☐ Female ☐ Male | Language preference: ☐ French ☐ English

Business phone | Mobile | Fax

[1] For SSQ Insurance, correspondence will be sent to your general agent business address.

Section B - Company or partnership information – to complete if you are an advisor attached to a firm or an advisor in a company

Name of firm or company

Business address of firm or company (if different from section A) | City | Province | Postal code

X

Signature of authorized signatory of the firm or company | Name of authorized signatory (please print) | Date (Y Y Y Y M M D D)

Important information about the appointment of advisors

In accordance with CLHIA recommendations, compliance will be assessed for each new appointment. Processing delays are possible but should not exceed 10 business days. As a result, at SSQ Investment and Retirement, no investment can be made until approval of the appointment.

Product distribution identification

Please specify the products you would like to distribute, provided you are authorized by SSQ to distribute these products. Please check all applicable boxes:

☐ **SEGREGATED FUNDS, ANNUITIES AND GIAs** (as defined in article 1 "Definitions" of the advisor contract and offered by SSQ, Life Insurance Company Inc.)

☐ **INDIVIDUAL LIFE AND HEALTH INSURANCE** (as defined in article 1 "Definitions" of the advisor contract and offered by SSQ Insurance Company Inc.)

Corporate sites description

SSQ Financial Group is pleased to offer you access to consult its corporate sites. The Astr@net and Extranet sites are exclusively reserved for SSQ Financial Group clients, advisors and agencies doing business with them. In addition to providing a wealth of information and various forms enabling you to manage your business effectively, you also benefit from the following accesses, specific to each of the two business lines.

At SSQ Investment and Retirement, the tool is known as Astr@net and it enables you to access your clients' files in consultation and transaction mode. It aslo enables you to consult returns on our ASTRA Funds, interest rates in effect at SSQ, maturity dates for GIC's held and your clients' statements.

At SSQ Insurance, the Web-based Extranet accesses we can provide allow you to use three different applications. They enable you to access information relating to underwriting, in force business as well as information on insureds, payers and policyholders, information in your advisor file, on remuneration and various reports (in force business, policy issue and settling requirements and remuneration).

To access these sites, you must read, then sign and date the following policy regarding use of the Astr@net and Extranet websites.

Corporate sites policy

Astr@net and Extranet website users are responsible for following and implementing the security measures designed to protect their access to these sites, in particular by not disclosing their username or password and by keeping this information in a safe place. Compliance with this policy is a way of protecting the personal information in client files; the undersigned is responsible for the consequences of any non-compliance with this policy.

For Investment and Retirement only:

Your clients may consult their portfolio by registering to Astr@net.

If you want them to also be able to carry out transactions, check the box below:

☐ I authorize my clients to consult their file and carry out transactions in their portfolio using the Astr@net.

Consent and signature – Corporate sites (mandatory)

I hereby declare having reviewed the corporate sites section and agree to keep strictly confidential the usernames and passwords issued to me to access SSQ's corporate sites.

X ______________________________ Y Y Y Y M M D D

Signature of advisor — Date

Canada's law on spam

In order to meet the requirements of Canada's law on SPAM, we must obtain your consent to send you certain communications by email.

Please note that you will continue to receive emails at all times as part of your business relationship with SSQ, Life Insurance Company Inc. and SSQ Insurance Company Inc., including information about the products and services offered and legislative and administrative changes.

Consent and signature – Canada's law on spam

I agree to receive information about contests, promotions, events and other special offers by email from SSQ, Life Insurance Company Inc. and SSQ Insurance Company Inc. This consent may be withdrawn at any time, either by calling us at **1-888-292-8483**, or by writing to us at **contracting@ssq.ca**, or by clicking on the link in our promotional emails.

X ______________________________ Y Y Y Y M M D D

Signature of authorized signatory — Date