

Temporary Signature Suspension Policy



KEY POINTS



- Orange Benefit Fund is temporarily suspending the need for clients to sign application forms
- Suspension in effect for all products
- Effective immediately and will continue through to until further notice
- All existing sales processes remain the same
- Please be sure to act in the best interests of your client

PLEASE FOLLOW THESE SIMPLE STEPS

1 INFORM CUSTOMER OF THE FOLLOWING AND OBTAIN CLEAR CONSENT

"Due to the global pandemic environment today, we are now completing the application process via video conferencing/phone (state which one). I am obligated to disclose to you that the information I collect today will be maintained in accordance with our privacy policy. Do I have your permission to collect your information for purposes of completing this application?"

2 CONTINUE PROCESS, ENSURING ALL REGULAR REQUIREMENTS ARE MET

3 INFORM CUSTOMER OF THE FOLLOWING AND OBTAIN CLEAR CONSENT

"Thank you for your time. Please note that the application will be reviewed and underwritten based on the information you have disclosed to me today. At time of claim, the insurer (Orange Benefit Fund) may request additional medical information to assess the claims.

Mr/Mrs/Ms. customer, do you confirm that:

- i) the information, including responses to the health questions, provided to me today is accurate?
- ii) you understand the product you've enrolled/applied for?
- iii) you consent to me submitting the application on your behalf?"

4 FILLABLE PDF AND PAPER APPLICATIONS

For all non-signature applications, the agent must write the following "**completed with consent via video conference/phone**" in the customer signature areas. **The agent then needs to sign the agent signature area.** Then the agent needs to send the PDF, or printed or scanned copy of the PDF, to their MGA for delivery to OBF by emailing it to **newbiz@orange.ca** or by **faxing it to (416) 223-1324.**