iA Financial Group

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ENROLMENT REQUEST

GROUP INSURANCE

As plan administrator, if you use My Client Space to enrol the plan member, please retain the form for your records. If you do not use My Client Space, submit a copy of the form to Industrial Alliance Insurance and Financial Services Inc. and retain the original. You can submit the copy of the form by:

	Quebec	**All Other Provinces**
Fax:	1-888-780-2376	1-888-781-0924
Mail:	Administration PO Box 790, Station B Montreal, Quebec H3B 3K6	Administration 522 University Avenue, Suite 400 Toronto, Ontario M5G 1Y7

TO BE COMPLETED AND SIGNED BY THE PLAN ADMINISTRATOR (Please print in ink)

Policyholder's name (Employer/organization) _____ **Group policy no.** _____

Division no. _____ Class no. _____ ☐ Certificate no. _____

Location no. or name (if applicable) _____ ☐ Certificate no. to be assigned by the insurer

Plan member's occupation _____

Employment date Y M D Eligibility date Y M D For reinstatement, date rehired full time Y M D

If you waived the waiting period, please explain why: _____

Salary $_____ ☐ Annually ☐ Biweekly ☐ Hourly – Hours worked/week _____
☐ Monthly ☐ Semimonthly ☐ Weekly

If there are benefits related to salary, please specify the salary.

Plan administrator's signature _____ Date Y M D

Plan administrator's email _____ Tel. no. _____

TO BE COMPLETED AND SIGNED BY THE PLAN MEMBER (Please print in ink)

1. PLAN MEMBER INFORMATION

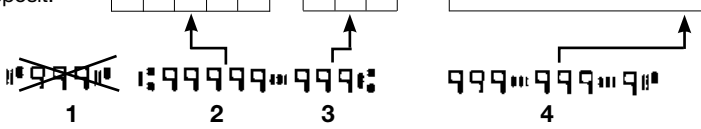
Last name _____ First name _____

Address _____ Postal code _____
No. Street Apt. City Province

Date of birth Y M D Sex: ☐ Male ☐ Female Language: ☐ English ☐ French

Direct deposit of your health and/or dental claim reimbursements and notification* of claim processing

Banking information for direct deposit: Transit # _____ Institution # _____ Account # _____



1 Cheque number (do not write this number).
2 Transit number (5 digits).
3 Financial institution number (3 digits).
4 Account number. The format may vary from one financial institution to another. Indicate **all** numbers and only the numbers.

Email address for notification*: _____

☐ Personal ☐ Work

☐ I do not want to receive notification

* You will be considered as having refused the notification if you do not provide your banking information or your email address or if you check "I do not want to receive notification".

Note: You can view the status and details of your health and/or dental claims via My Client Space, our secure website, at any time.

Please complete all four pages of this form and sign the "PLAN MEMBER CONFIRMATION/AUTHORIZATION" section.

IMPORTANT: The basic dependents' life insurance coverage will be automatically applied if your plan includes this benefit and your dependents (spouse and children) are eligible. This requirement applies regardless of the coverage chosen for the health and dental benefits (individual, family, single parent, couple or refused coverage).

2. SPOUSE INFORMATION

Last name _____ First name _____

Date of birth Y M D Sex: ☐ Male ☐ Female

Does your spouse already have health and/or dental coverage under another group plan? ☐ Yes ☐ No

If Yes, specify his/her: Health coverage: ☐ Individual ☐ Family ☐ Single parent ☐ Couple

Effective date: Y M D

Dental coverage: ☐ Individual ☐ Family ☐ Single parent ☐ Couple

Effective date: Y M D

Insurer's name _____

Group policy no. _____ Certificate no. _____

Note: If your spouse is a common-law spouse, please contact your plan administrator to confirm his/her eligibility.

3. DEPENDENT CHILDREN INFORMATION *(if more space is required, please use another sheet. Date and sign any attached document.)*

Last name	First name	Sex	Date of birth	If age 21* or over, specify
		☐ M ☐ F	Y M D	Full-time student ☐ Yes ☐ No Disabled ☐ Yes ☐ No
		☐ M ☐ F	Y M D	Full-time student ☐ Yes ☐ No Disabled ☐ Yes ☐ No
		☐ M ☐ F	Y M D	Full-time student ☐ Yes ☐ No Disabled ☐ Yes ☐ No
		☐ M ☐ F	Y M D	Full-time student ☐ Yes ☐ No Disabled ☐ Yes ☐ No

* The age limit may vary depending on your plan. Please contact your plan administrator to confirm this information.

If any of your dependent children have coverage under a group insurance plan other than yours or your spouse's, complete the following table:

Child Last name, First name	**Plan type** (e.g. school plan, etc.)	**Insurer name**	**Group policy no.**

4. CHOICE OF COVERAGE

Coverage requested*: ☐ Individual ☐ Family ☐ Single parent[1] ☐ Couple[1]

[1] Select this coverage only if offered by your plan. Please be advised that if single parent and couple categories are not offered, you will automatically have family coverage.

Plan/Option/Module (if applicable) _____

*If you and/or your dependents **already have health and/or dental coverage under another group plan,** you can refuse to be covered for health and/or dental benefits under this group plan by checking the following boxes:

For myself and my dependents: ☐ I refuse health benefits ☐ I refuse dental benefits

For my dependents only: ☐ I refuse health benefits ☐ I refuse dental benefits

Note: If you refuse coverage and wish to request it at a later date, certain conditions may apply. Please contact your plan administrator for further details.

5. OPTIONAL BENEFITS

If the ExtensiA benefits are offered as part of your group plan and you wish to enhance your coverage with ExtensiA's optional life, accidental death & dismemberment (AD&D) and critical illness insurance, simply go to My Client Space, our secure website, and under *ExtensiA – Optional Benefits*, click on *Online Enrolment* or complete the *ExtensiA Application* form. Do not complete the table below.

If the ExtensiA benefits are not offered as part of your plan, you can enrol in our standard optional benefits. Prior to enroling and completing the table below, please check with your plan administrator if optional benefits are offered as part of your group plan and if you should complete the *Evidence of Insurability* form (F54-002A).

Standard optional benefits:

	Life*	Accidental Death and Dismemberment*	Critical Illness*	Statement (Complete only if you want to add optional life and/or optional critical illness benefits)
Plan member	$_____	$_____	$_____	In the last 12 months, have you used tobacco in any form whatsoever, nicotine products (gum, patches, etc.) or marijuana? ☐ Yes ☐ No
Spouse	$_____	$_____	$_____	In the last 12 months, has your spouse used tobacco in any form whatsoever, nicotine products (gum, patches, etc.) or marijuana? ☐ Yes ☐ No
Children	$_____	$_____	$_____	Each child will benefit from the coverage amount you selected.

*Please indicate the coverage amount to be added. Do not include basic coverage.

6. APPOINTMENT OF BENEFICIARY *(If you do not appoint a beneficiary, the benefit will be payable to the estate.)*

1. Primary beneficiaries

If you name multiple primary beneficiaries, the total allocation must be equal to or less than 100%. If less than 100%, the difference will be payable to the estate. Please do not indicate dollar amounts.

Last name	First name	Relationship	Date of birth	%
			Y M D	
			Y M D	
			Y M D	

2. Contingent beneficiaries

If you wish, you can also appoint contingent beneficiaries in the event **all** primary beneficiaries predecease you. If you name multiple contingent beneficiaries, the total allocation must be equal to or less than 100%. If less than 100%, the difference will be payable to the estate. Please do not indicate dollar amounts.

Last name	First name	Relationship	Date of birth	%
			Y M D	
			Y M D	

IMPORTANT: For Quebec residents only – to be completed if you appointed your spouse (marriage or civil union) as a beneficiary.

In Quebec, the designation of a spouse, excluding a common-law spouse, as a beneficiary is irrevocable* unless you check the following box:

☐ Revocable beneficiary

*To change the appointment of an irrevocable beneficiary, his/her written consent will be required.

Please sign the "PLAN MEMBER CONFIRMATION/AUTHORIZATION" section on the next page.

7. TRUSTEE DESIGNATION *(Not applicable in Quebec*)*

You can appoint a trustee to receive any amount due to any beneficiary under the age of majority.

Trustee's last name _____ First name _____

*In Quebec, there might be issues with respect to the appointment of a trustee. You should consult a legal advisor before appointing a trustee.

PLAN MEMBER CONFIRMATION/AUTHORIZATION

I HEREBY APPLY for the benefits which I am eligible for under my Employer's/Policyholder's group insurance plan, subject to any refusal indicated and **CONFIRM** that the information contained in this form is true and complete to the best of my knowledge.

If applying for benefits for my dependents, **I CONFIRM THAT I AM AUTHORIZED** to disclose information concerning them for the purpose of determining their eligibility for coverage.

On behalf of myself and my dependents, **I CONSENT TO THE RELEASE** of the information provided to my Employer/Policyholder and Industrial Alliance Insurance and Financial Services Inc. (the "Company"), its employees, agents, reinsurers and service providers for the purpose of underwriting, administration, claims processing and the enrolment of myself and my dependents in my Employer's/Policyholder's group insurance plan. In addition, **I UNDERSTAND** that personal information may be subject to disclosure to those authorized under the applicable laws within or outside of Canada.

If my Social Insurance Number is used as my certificate number, **I AUTHORIZE** its use for the administration of my group insurance plan.

I AUTHORIZE my Employer/Policyholder to make the required salary deductions for my group insurance plan.

If I enrol in direct deposit, **I AUTHORIZE** the Company to deposit in my bank account, using the banking information I have provided in section 1, any amounts payable in regards to a claim that I submit under my group insurance plan. **I AGREE** that this authorization will apply until such time as I submit a written request to the contrary to the Company. **I UNDERSTAND** that the Company will have no further obligation with regard to the claims paid. **I ALSO UNDERSTAND** that the Company can, without prior notice, terminate the direct deposit of my claims payments. This authorization takes effect on the date indicated below and will be valid for all other active bank accounts at this or any other financial institution that I may name in the future.

Furthermore, if I enrol in direct deposit, **I UNDERSTAND** and **AGREE** that if I provide the Company with incorrect banking information or if I fail to notify the Company of any change in my banking information and, as a result of this error or omission, the amount of a paid claim is deposited into the wrong bank account, the Company cannot be held responsible or liable for this error or omission or be obligated to reimburse me if the Company is unable to recover the amount that was paid into the wrong account.

I AGREE that a photocopy of this Confirmation/Authorization shall be as valid as the original.

Plan member's signature _____ Date Y M D

DISCLOSURE

At Industrial Alliance Insurance and Financial Services Inc. (the "Company"), the personal information we collect concerning you and your dependents is kept in strict confidence and is only used for the purposes you have authorized. Your personal file will be kept at the Company's offices.

You have the right to request access to your personal information and, if necessary, correct any inaccurate information. To do so, send a written request to: Industrial Alliance Insurance and Financial Services Inc., Information Access Officer, 1080 Grande Allée West, PO Box 1907, Station Terminus, Quebec City, Quebec, G1K 7M3.

Access to your personal information will be limited to employees, agents, reinsurers and service providers of the Company in the performance of their duties, individuals to whom you have granted access, and persons authorized by law.

For the purposes of audits and administrative reporting, the Company may release to your Employer/Policyholder statistical financial information without personal identifiers.

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iA Financial Group is a business name and trademark of
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