



CANADA  
PROTECTION  
PLAN®

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Peace of Mind

A Foresters Financial™ Company

# Advisor eDelivery Guide

Enhancing processes for you and your clients

Your clients\* can now enjoy the enhanced electronic delivery option (eDelivery) for receiving their policy packages. Each policy package will include the following:

- ▶ The electronic insurance contract (ePolicy), including a copy of the application
- ▶ Welcome letter
- ▶ Privacy notice
- ▶ Foresters Financial member benefits brochure
- ▶ Endorsement (if applicable)

This guide offers helpful directions for your client to get started.



## How does a client opt-in for eDelivery?

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- Your client will be prompted to select their preferred method of policy delivery during their application signing process with their advisor via eAccess.
- Once the policy is issued, your client cannot switch delivery methods.



## What should you know if your client opts-in for eDelivery?

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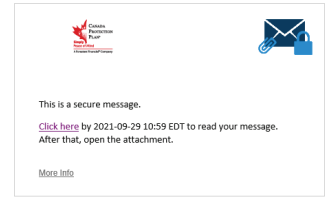
- Your client will receive their ePolicy and all other policy package documents in PDF format, which will require Adobe Reader to open. If your client does not have Adobe Reader on their computer, a free version can be downloaded from the [Adobe website](#).
- Your client will not receive a paper copy of their policy.
- Your client needs to have a personal email address for receiving their policy package. They cannot use your email address or one you have access to, nor can you set up an email address for them.

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\* For the purpose of this document, the owner of the policy will be referred to as the client.

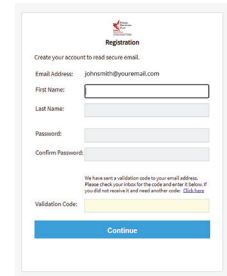
## ✓ What should the client expect if opted in for eDelivery?

**1** Your client will be notified via email that their ePolicy will be delivered shortly, then emailed when the ePolicy is delivered and ready to be viewed. The first email will provide directions on how your client can register via Proofpoint and open and view their documents.



Disclaimer: This email and its content are confidential and intended solely for the use of the address. Please notify the sender if you have received this email in error or simply delete it.  
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**2** If this is your client's first secure email from Canada Protection Plan, they will need to enter their first and last names, create a password, and enter the validation code. This validation code will be emailed to them after they've entered their information into Proofpoint. The validation code is required to complete the registration.



**3** The client will now have access to their Policy Package.



**Note:** Your client will have 30 days to access the portal via the secure email link, afterwards they will only be able to access it by clicking the attachment file in the email which will direct them to the Proofpoint registration portal.

## ✓ What should you expect if your client opts-in for eDelivery?

- Canada Protection Plan will send your client their policy package via eDelivery hosted by Proofpoint. An email will be sent to you and the MGA notifying you that the ePolicy has been delivered and that it is available to view through *WealthServ (Blue Sun Broker portal)* and/or *Blue Sun Advisor Portal*.
- No paper copy of the contract will be delivered.

*For any assistance with receiving your ePolicy, please contact [epolicysupport@cpp.ca](mailto:epolicysupport@cpp.ca)*

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