New Business Submission Procedure

In order to help you to do business comply and smooth, **effective from 1st March, 2021**, the following procedure for new business submission in place, which help you and Affinity to meet with the compliance requirement, and help our staff to follow up your cases more efficiently.

For Equitable (EQ), CPP, Foresters only - New business applications, Online E-applications submission:

1. All new business applications and E-applications should put this MGA email address newbusiness@affinityfinancial.ca on the application form as contact email, this is for insurance company to notify Affinity for the cases updates;
2. If the new business submitted by paper; please scanned a PDF file of the application to keep for record in your own client file.
3. If the new business submitted online / E-application; please download the PDF file of the application to keep for record in your own client file.

This is advisor's responsibility to email the following documents to us to meet the compliance requirements:

All Life & Seg Fund new cases, E-application, policy admin documents please email to:

1. For BC advisors - To : case@affinityfinancial.ca
2. For AB advisors - To : adminedmonton@affinityfinancial.ca; cc : case@affinityfinancial.ca
3. For ON advisors - To : adminontario@affinityfinancial.ca ; cc : case@affinityfinancial.ca

For all life & Seg Fund new businesses:

- i) New case application pdf. file;
- ii) Plan illustration – signed by client (if applicable) ;
- iii) Advisor Disclosure – signed by client;
- iv) Leverage Disclosure - signed by client (for investment loan case)
- v) Sales Charge Disclosure – signed by client (for Seg Fund case)
- vi) Investor Profile / Risk Tolerant analysis
- vii) Reason Why Letter

Please also sent us a copy of all policy admin document:

- i) Signed policy delivery documents
- ii) Policy delivery payment (cheque / or bank draft copy with receipts)