

Visit [www.hugoinsurance.ca](http://www.hugoinsurance.ca) and view a preview of the platform by clicking on “Live the HuGO experience”.

HuGO offers:

- ✓ An intelligent online platform.
- ✓ A personalized experience: Only relevant questions are asked and unnecessary questions are skipped.
- ✓ A radically different process: in 65% of cases, the policy will be accepted instantaneously and your client will receive his/her policy within a few days.

## IF YOU ALREADY HAVE A DISTRIBUTION CONTRACT WITH HUMANIA ASSURANCE INC.

On the online sales platform, you can create up to three sales simulations. To do so, use the “Sale simulation” button in the bottom left of the Application manager screen.

The screenshot displays the HuGO Application Management interface. At the top right, the user is identified as 'Roger' with options for 'LOGOUT' and 'NEED INFORMATION'. The main heading is 'Application Management', accompanied by a '+ New Application' button. A table with columns for 'Insured', 'Age', 'Face Amount & Term', 'Monthly Premium', 'Creation Date', and 'Status' is present, but it is empty. A message below the table reads: 'No existing application found. Click on "New Application" to create one.' At the bottom left, a button labeled 'Sale simulation [3 Left]' is highlighted with a red box. At the bottom right, there are 'Delete' and 'Continue' buttons.

Except for a few details, you will be able to simulate the entire sales process.

These details are:

- Client **first name and last name** cannot be changed to ensure you don't inadvertently use “Sale simulation” with a real client.
- Two payment options are offered at *step 7 / Payment*. In order to avoid a pre-authorized amount being taken from the credit card, we recommend selecting pre-authorized debit as the method of payment.
- The application won't be sent to Humania Assurance and **the email confirmation** request will not be sent to the client.

**IMPORTANT NOTICE:** sales simulations, completed or not, will be deleted at the end of the day.

### WHERE TO FIND HUGO

Access to *Online Sales Platform* in Advisor's secure site from:

- ✓ Humania Assurance website: [www.humania.ca](http://www.humania.ca)
- ✓ Life Insurance product microsite: [www.hugoinsurance.ca](http://www.hugoinsurance.ca)
- ✓ Advisor's secure site: [extranet.humania.ca](http://extranet.humania.ca)

### REQUIRED CUSTOMER INFORMATION

**As it's an instant application, you will need the following:**

- Client's email.
- Valid ID: driver's licence, passport, Health Insurance Card.
- Specimen cheque or credit card.

**It is also suggested to have this information:**

- Social Insurance Number (SIN)
- Information on attending physician
- List of medication

**IMPORTANT:** The customer SIN is not mandatory but it allows the MIB to better identify the person thereby tailoring the insurability questions and accelerating the sales process.

### COMPLETE THE APPLICATION AT YOUR OWN PACE

Once *step 1 / Coverage* is completed, all entered information will be stored automatically, allowing you to come back later.

#### Retention periods



30 days to complete the application;

7 days to complete *step 3 / Insurability* (from the beginning of this section);

3 days for the insured/policyholder to confirm the sale by email.

At any time, if you have questions concerning HuGO Life Insurance and its promotional offer, don't hesitate to contact our sales team members: [humania.ca/en-CA/representants/ressources](http://humania.ca/en-CA/representants/ressources)