



APEXA 2019

Bridgeforce Compliance Sessions



WHAT IS APEXA?



COMPANY OVERVIEW

Advisor contracting and
compliance made EASY.

WHAT IS APEXA?

A centralized, standardized digital contracting and compliance solution connecting Canadian Advisors, MGAs, and Carriers.

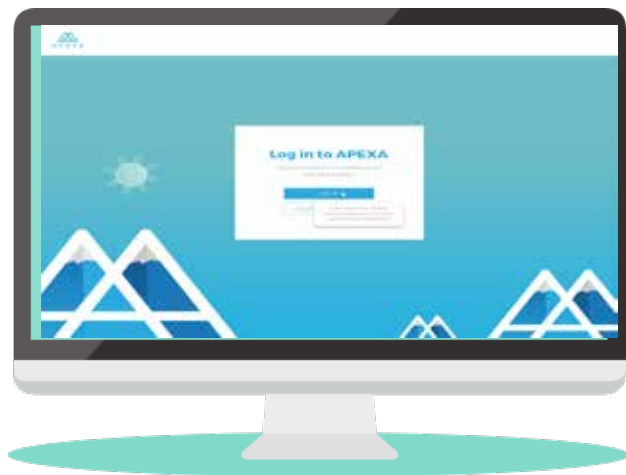
APEXA brought together teams of experts from nine leading Canadian MGAs and Carriers, industry compliance professionals, and subject matter experts to form Canada's first industry-governed solution for advisor contracting and compliance.

APEXA is innovation at its best.



WE MAKE INSURANCE MORE EFFICIENT FOR ADVISORS, MGAs & CARRIERS

Through standardized processes, a digital platform and automated monitoring and notifications for advisor contracting and compliance.



Simplified Contracting



Consolidated Advisor Profile



Manages Compliance Risk

From **Paperwork** to **Paperless**

All the information you need, all in one convenient place.
You'll never chase down paper contracts again.



WHAT IS IN MY ADVISOR PROFILE?

APEXA brings all Advisor data together in one powerful, integrated system and information updates in real time.



Personal Info

Details such as names and address history.



Licence(s)

Validated by APEXA against provincial websites for each province the advisor is actively licensed.



E&O Coverages

Verified and measured against province of residence minimums.



Contracts

Broker codes are captured so you see what you are party to

BENEFITS FOR ADVISORS



1

Paperless Contracting

2

One Profile Connects you to your MGA and Carriers

3

Digital means Real Time Updates.
As soon as you update your profile, those you are contracted with will be notified.

4

CE Credit Tracking

5

E&O and License Reminders

6

All your Broker codes in one location

MARKET SHARE & ADOPTION

CURRENT USERS:

Representing 70% of Market Coverage

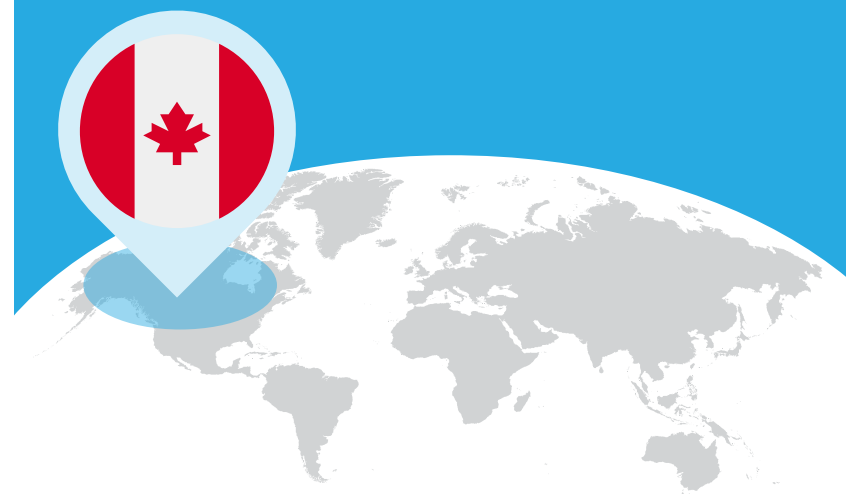


UPCOMING USERS:

Major Carriers Onboarding



Creating an industry wide solution in the Canadian marketplace.



WHAT DO I NEED TO REGISTER?

Welcome to the APEXA Advisor Portal

You're about to complete the profile set-up process. The initial set-up will take some time, but once it's complete all of the Carriers and MGAs that you work with on APEXA will have access to this information and any updates you make in the future will be automatically provided to them.

Before you begin, make sure you have the following things you'll need to complete your profile:

- Your address history for the last 5 years
- Digital copy of your E&O Coverage policy
- Digital copy of your provincial licence(s)
- Information about the Insurance carriers you have worked for in the past
- Digital copy of your banking information (void cheque)

If you're responsible for a corporation, you'll need a few additional items:

- Your company's date of incorporation
- Digital copy of your Articles of Incorporation
- A list of shareholders for your company

[Begin Profile Setup](#)



WHAT DO I NEED TO REGISTER?

- Address history – 5 years
- Have Your E&O and Licenses on your laptop – so you can upload them
- Void Check – Digital Copy
- Insurance History

§ List, in order of total volume, the insurance companies with which you have placed business in the last 5 years. Indicate the lines of business for each company by a check mark under the corresponding product.

Name of Insurance Company	Are you still associated with co.?		Year associati on began	Lines of Business			Approximate Total Premiums (if known) For Life Products
	Yes	No		Life/A&S	Wealth	Other	

WHAT DO I NEED TO REGISTER IF I AM A CORPORATION?

- Date of Incorporation
- Business Address history
- Digital Copy of your Articles of Incorporation
- List of Shareholders in your company

HOW DO I GET INVITED TO APEXA?

MGA initiates
APEXA invite



Advisors receive
an email from
APEXA



Confirm your
email address



Login to APEXA
and create your
account



Complete Profile
Wizard

Congratulations!
You're all set.

Invitation Received

From notification@apexa.ca

What actions to take next?



APEXA

WELCOME TO APEXA

Peter Sellers,
You are invited to join APEXA.

A partner has invited you to join APEXA. By entering the token provided below or clicking the link, your profile will be prefilled on APEXA.

Is this your first invitation to join APEXA?

Create your account and verify your e-mail address.

Register within 10 days for a chance to win \$500

Already have an APEXA profile?

Add additional contract(s) by clicking below.

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Get Started



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Add My
Contracts

Need help? Our team can be reached at support@apexa.ca or 1-800-XXXX.

Invitation Received
Getting Started



Login Screen

APEXA Registration

Please provide your first name:

Register








Please provide your registration information. You should have received an email invitation token from your MGA and/or Carrier. You'll need that information in that email to proceed with the registration process.

Token is
pre-populated



Login Screen

APEXA Registration

	<input type="text" value="Peter"/>	✓
	<input type="text" value="Sellers"/>	✓
	<input type="text" value="hmxc2@slipry.net"/>	✓
	<input type="text" value="hmxc2@slipry.net"/>	✓
	<input type="text" value="2WVPY4PQP2X79K8Z"/>	✓
	<input type="password" value="....."/>	⊖
Password Strength: Ok		
	<input type="password" value="....."/>	✓

Please provide your registration information. You should have received an email invitation token from your MGA and/or Carrier. You'll need that information in that email to proceed with the registration process.

Proceed when all fields are green!

⊖ Register



Email Authentication

From notification@apexa.ca

Confirm Your Account



Confirm your account



Peter Sellers, you're almost there!

Confirm your account email through the link below.

Confirm Account

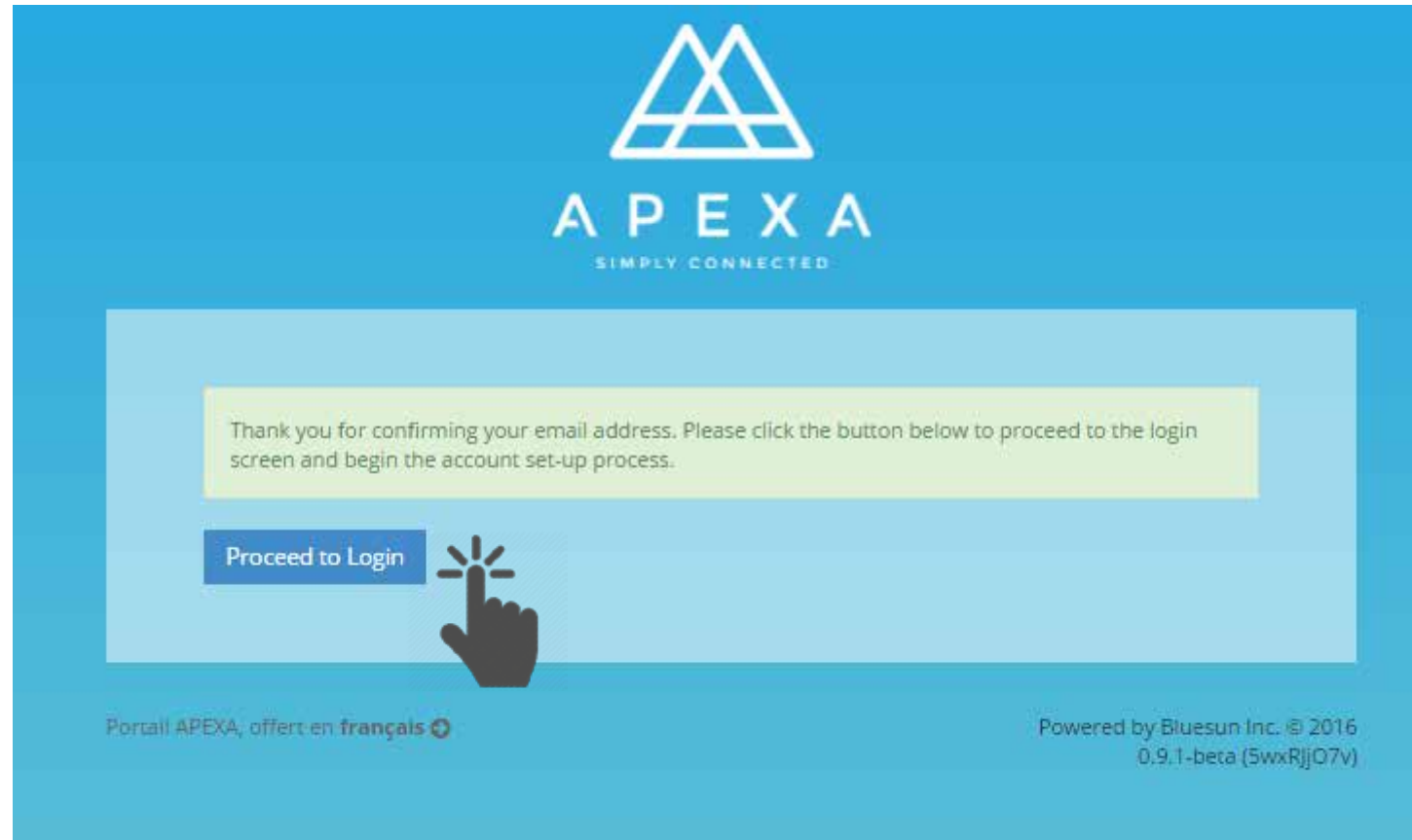


Need help? Our team can be reached at support@apexa.ca or 1-800-XXXX.

Have a great day,

The APEXA Team

Email Confirmation Screen





Sign In

Welcome to the APEXA Portal

Login to your account

 Email Address - Example: john.doe@exampl

 Password

Login

[Forgot your Password?](#)

New to APEXA?

[Register](#)

Click the button above to begin account setup process.

**Sign into
your account**



CONTACT US

GET IN TOUCH



DYLAN FRIEDMANN

VP Client & Partner Experience
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