

DocuSign/E-Signatures

As of December 22, 2020

	New App	Delivery	Inforce Requests	Additional notes
Assumption	Yes	Yes	Yes except bank changes at this time	Electronic transaction summary document must be submitted with any transaction. It must “capture signature” or “drawn to device”, Assumption does not accept click to sign
BMO	Yes	Yes	Yes except title changes at this time	
Canada Life	Yes	Yes	Inforce requests can be completed using an electronic signature provider and must include a copy of the electronic transaction summary. At this time electronic signature is not available for Ownership and Beneficiary changes.	Electronic transaction summary document must be included with the application
CPP	No	No	No	
Desjardins	Yes	Yes	TBA	Electronic transaction summary document must be included with the application
Empire	No	See Additional notes	Empire will accept any digital/electronic signature from a verified source for all inforce forms except beneficiary changes, ownership changes and claim forms which still require a wet signature	Allowed for Non face to face delivery attesting to the witness (via screen sharing method)
Equitable	No	No		
Foresters	No	No	Yes for most inforce requests, see the following link for full details: https://bluesky.foresters.com/webgui/App_Content/EN/Forms/505224-can-foresters-docusign-guide.pdf	Electronic transaction summary document must be included with the request
Humania	No	No		
IA	Yes	Yes	TBA	OneSpan, DocuSign, AdobeSign and FormStack format only accepted
Ivari	Yes	Yes	TBA	Freeform/Stylist signatures only, script signatures not accepted
Manulife	No	No	Esignature must be done via DocuSign. No other platform is accepted at this time	Electronic transaction summary document must be included with the application
RBC	Yes	Yes	Yes for inforce requests except Beneficiary and Ownership changes which require wet signatures at this time.	Electronic transaction summary document must be included with the application
SSQ	No	No	No	
SUN	Yes	Yes	Yes	Acceptable platforms are DocuSign, Adobe Sign and OneSpan. If using these for paper apps or inforce documents the digital certificate must also be included with the paperwork.