Smart**Delivery**™

Working with Licensed Assistants

BMO Insurance

Working with Licensed Assistants

If you are an advisor who has designated life insurance licensed assistants, you can give these individuals access to a SmartDelivery package so that they can help with the eDelivery process.

Licensed Assistants, when assigned to a policy, can:

- view the policy on their SmartDelivery dashboard
- view the policy details and perform all aspects of the eDelivery process, except for eSigning the eDelivery documents.

Assigning a Licensed Assistant to eDeliver a Policy

A licensed assistant can be designated to help perform eDelivery using the 'ASSIGN LICENSED ASSISTANT' function on the eDelivery Review screen.

Select the assistant from the list of associated Licensed Assistants and click 'CONFIRM'.

Servicing advisors can click here to assign a licensed assistant.

! When a licensed assistant is assigned, the servicing advisor is still the individual who is ultimately responsible for the delivery and is thus required to eSign the delivery documents.

Licensed assistants will also be copied on all notifications that the advisor receives once they have been assigned to the policy.

! For added flexibility, if a particular licensed assistant was assigned to assist with the completion of an application in SmartApp, the servicing advisor can assign that individual or another of their licensed assistants to eDeliver the policy. In other words, licensed assistants are NOT automatically assigned.
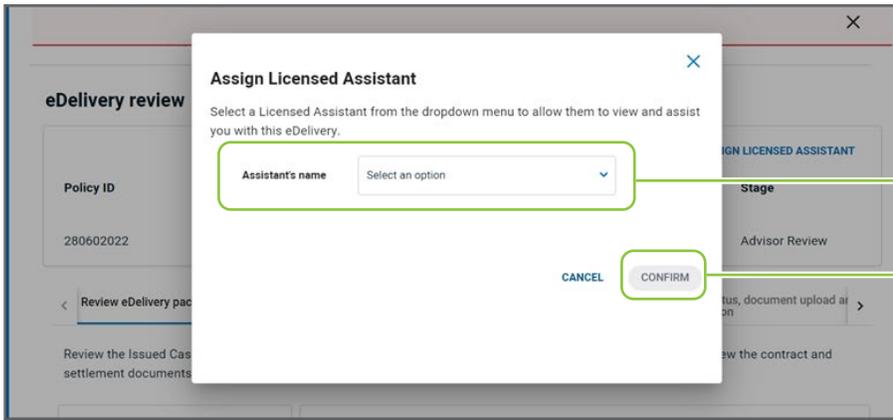
Servicing advisors can select the licensed assistant who may be assigned to the policy.

Then, click 'CONFIRM'.

Once a licensed assistant is assigned, their name will be visible to the advisor on the eDelivery Review screen.
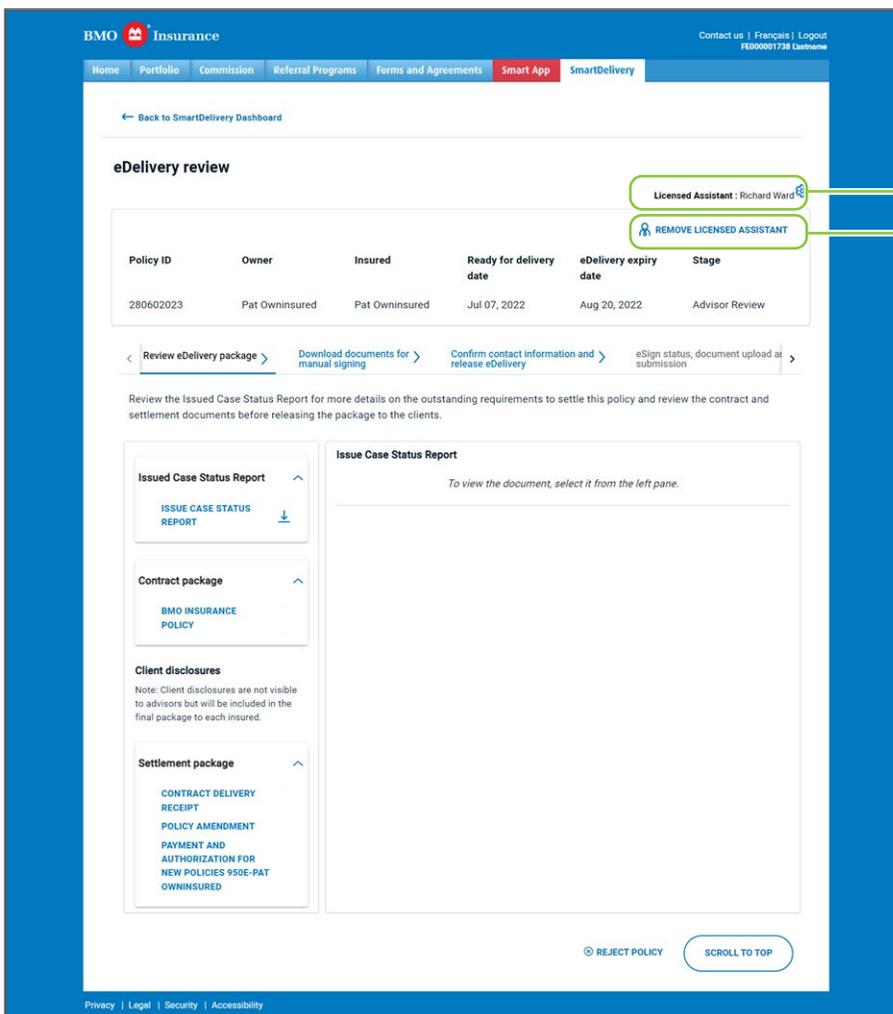
The assigned licensed assistant can also be changed, using the gear icon beside their name.

If the servicing advisor needs to revoke a licensed assistant's access to a SmartDelivery package, this can be done using the 'REMOVE LICENSED ASSISTANT' function.

Working with SmartDelivery as a Licensed Assistant

As described above, once a licensed assistant has been assigned to a SmartDelivery policy by the servicing advisor, the assistant can perform all the eDelivery functions described in this Guide, with the exception of eSigning the documents. The servicing advisor will still receive the eSign invitation and be prompted to sign once all other parties have completed their review and signatures.

The SmartDelivery dashboard of a licensed assistant will display all the policies that they have been assigned to work on.

When a licensed assistant views a policy, the name of the servicing advisor will be visible on the eDelivery Review screen.

? Need help?

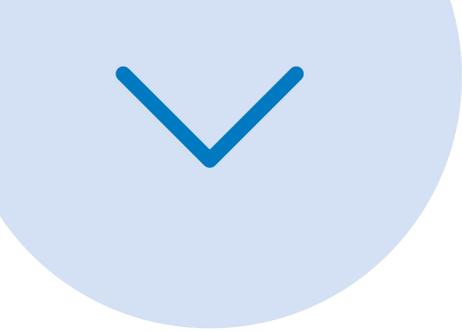If you require assistance with the SmartDelivery process, please contact our Digital Support Team (DST) at **Insurance.DST@bmo.com** or 1-855-208-3675 from Monday to Friday, 9:00AM - 6:00PM ET.

If you have questions about the specific delivery requirements or contract for a specific policy, please contact your MGA/National Account New Business team.

Let's connect

To find out more about BMO Insurance products, please call your MGA, contact the BMO Insurance regional sales office in your area or call **1-877-742-5244**.

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