



# APEXA PROFILE SET UP

Advisor Tip Sheet



### WHAT YOU'LL NEED

Before you begin, make sure you have everything you'll need to create your APEXA profile

- Your residential and business address history for the last 5 years
- A digital copy of your E&O Coverage certificate
- A digital copy of your provincial licence(s)
- Information about the insurance carriers you have worked for in the past
- Your selling codes – you may need them to complete an identity verification step
- A digital copy of your banking information (e.g. void cheque) – optional

#### A note about digital copies

- Acceptable file formats include: PDF, MS Word, JPG, PNG, TIFF and BMP
- For licences, you can also use a screen capture from a provincial licencing body website

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If you're responsible for a corporation, you'll also need...

- Your company's date of incorporation
- A digital copy of your Articles of Incorporation
- A digital copy of your corporate E&O Coverage (if different from your personal E&O)
- A digital copy of your corporate provincial licence(s)
- A list of your shareholder(s), including email address(es) and ownership percentage

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### REGISTERING YOUR ACCOUNT

When you're creating your APEXA account, you'll have to complete a two-step registration process

1. **Registration:** when you follow the link from your email invitation, you'll be asked to complete the registration form to create your account.

**APEXA Registration**

First Name

Please provide your first name

Last Name

Email Address

Confirm your Email Address

6QNV39NQRDQ4E8J

Token: this field will be pre-populated with your APEXA token. Please do not make any changes to this field

Register

2. When you click '**Register**' the **Privacy Consent** terms and conditions will open. Read the conditions and **scroll to the bottom** of the terms to click **Accept**.

**Privacy Consent**

How will my data be protected?

APEXA has implemented reasonable safeguards to protect advisor, principal, partner and shareholder information from unauthorized access, use or disclosure. This information is maintained in a file on APEXA's servers and will be accessible by authorized APEXA employees, representatives and agents who require access to perform their job functions.

What if I have questions or would like to access or correct my information?

Any questions or concerns about how information is handled by APEXA in connection with the APEXA Service should be directed to the Privacy Officer at privacy@apexa.ca. Advisors, principals, partners and shareholders may also request access to or correction of their information by contacting the Privacy Officer, as described above. APEXA shall make reasonable efforts to respond to such requests within thirty (30) days. However, if such information is comingled with the information of others, responses may be delayed and access may be denied if such information cannot be segmented from the information of others.

At any time, if you prefer that your personal information not be used for any of the identified purposes above, in whole or in part, you may notify the Privacy Officer in writing at any time. However, revocation of such consent may significantly restrict your access to and use of the APEXA Service.

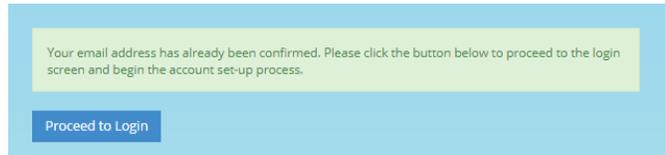
Click Here

Accept Cancel

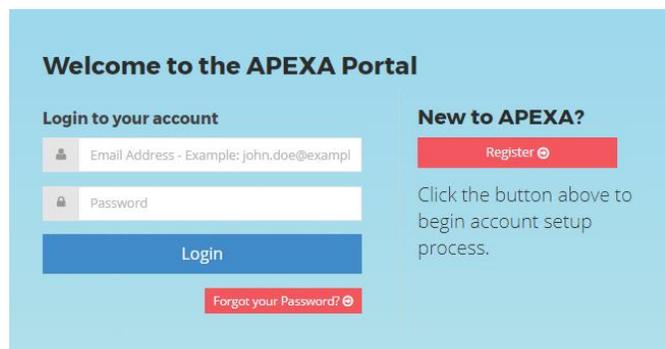


### CONFIRMING YOUR ACCOUNT

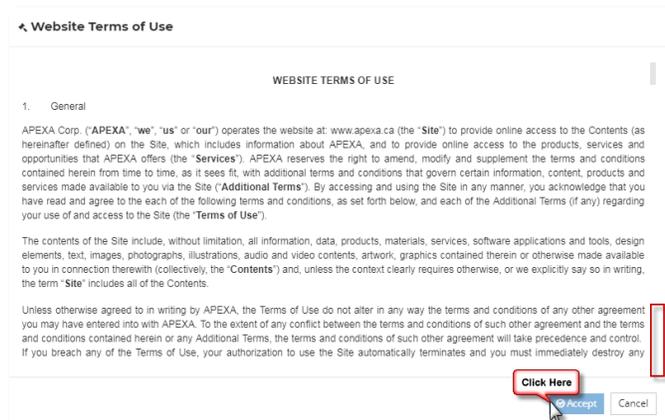
- You will receive a second email, click **Confirm Account** in the email, and then **Proceed to Login** on the website.



- To create your profile, enter your registered email and password, then click **Login**.



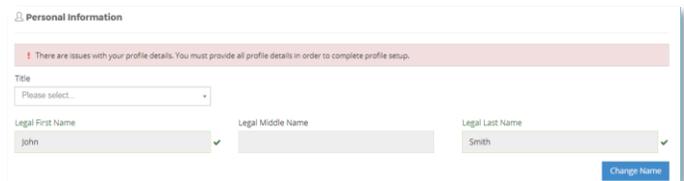
- The first time you login, the **Website Terms of Use** will open. Read the conditions and **scroll to the bottom** of the terms to click **Accept**.





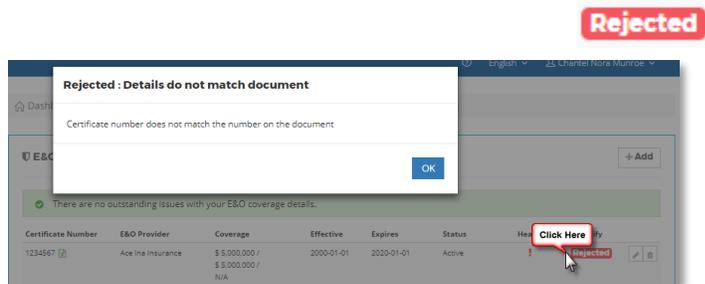
### WHAT TO DO IF YOUR NAME IS WRONG?

- Your Profile name **should** match the name on your resident licence
- Your Profile name, at the top of the screen and the name fields below, will be the name provided by your MGA
- If you need to change your name, click on **Change Name** button. Changes will be verified by APEXA and you will be notified by email once the review is complete
- Simple corrections, for reasons such as typos or changing short form to full name, will be accepted without supporting documentation
- Documentation will be required for all other types of name changes



### HAS YOUR E&O BEEN REJECTED?

Click on the **Rejected** button to view rejection reason(s)



Common rejection reasons are:

- Document file type is not an acceptable format (see [What You'll Need](#) section above)
- The wrong Provider has been selected
- The wrong document has been uploaded

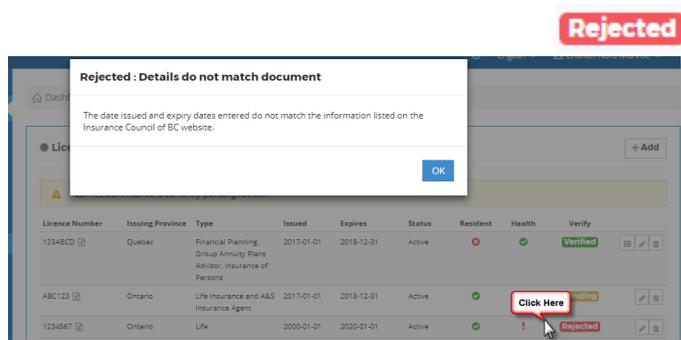
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### HAS YOUR LICENSE BEEN REJECTED?

Click on the [Rejected](#) button to view rejection reason(s)



Common rejection reasons are:

- Document file type is not an acceptable format (see [What You'll Need](#) section above)
- Licence has expired; only an active licence will be accepted
- Licence name must match Full Legal Name entered, as well as the name on your profile
- The wrong document has been uploaded
- Individual licence uploaded as Corporate licence (or vice versa)

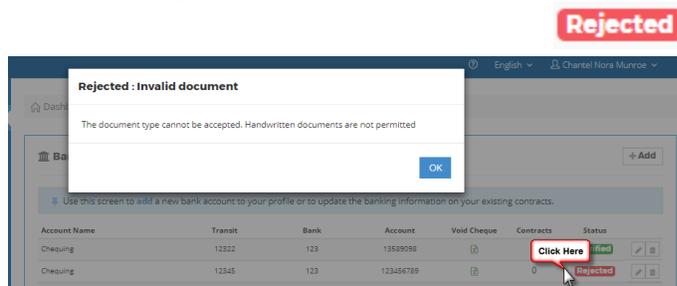
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### HAS YOUR BANKING INFORMATION BEEN REJECTED?

Click on the **Rejected** button to view rejection reason(s)



Common rejection reasons are:

- Document file type is not an acceptable format (see [What You'll Need](#) section above)
- Invalid Document attached. We require a copy of a void cheque for the account indicated or an EFT form. These forms must be legible, and have all information pre-printed by the bank (no handwritten fields)

## NEED HELP?



Call us at: 1-855-294-2541



Email us at: [support@apexa.ca](mailto:support@apexa.ca)