



Improved EASE and New Application Releases

EASE

Further to a recent communication announcing enhancements to our lending processes, we are pleased to announce enhancements to our EASE system. For users that are familiar with EASE, you will now find that screens are modified to be consistent with the application forms, in addition to enhancing the field descriptions to minimize errors.

Some of the enhancements include updates and clarifications for entering mandatory fields as the system will now validate that the new mandatory fields are entered. The following enhancements have been added to the 'Borrower' and 'Co-borrower' tabs to help avoid delays:

- Simply indicating consent to credit check on EASE rather than on a separate document
- Providing previous employer if at current employer for less than two years
- If selecting current address at two years or less, you will be asked to provide previous home street address
- If Social Insurance Number (SIN) is provided in the identification section, it will be validated against the value entered in the Borrower's information section

If you are new to EASE or haven't used EASE in a while, either [register](#) to obtain a password or [log in](#). Once set up you can begin entering loan applications online immediately.

We have also made improvements in the way that B2B Bank staff interacts with Primerica Representatives so that the funding time can be minimized. Beginning December 15, 2014, we will attempt to contact Representatives by phone if mandatory information is missing.

New B2B Bank RSP Loan Application

As of December 15th, 2014, we released a new RSP Loan application. Changes were made to the application to match the enhancements made to EASE.

Please begin using these new forms immediately in order to expedite your clients' loan applications. For help in filling out the new form, have a look at our [NEW Sample Application](#) available online through the Primerica Resource Centre at b2bbank.com/primerica or call B2B Bank Client Services at 1.800.263.8349 for more details.

New B2B Bank Dealer Services Applications

As a result of recent legislation amendments (including AML and addenda updates to both Nova Scotia and Alberta Locked-in plans), we have updated all B2B Bank Dealer Services intermediary account opening applications.

The new applications are now posted online at b2bbank.com/dealerservices under the 'Forms' section. Online applications through Advisor Access will be updated Friday, January 2nd, 2015.

Please start using the updated versions immediately as existing copies of the applications will only be accepted until December 31, 2014. If you have any questions, please contact B2B Bank

Dealer Services at 1.800.387.2087.

Thank you for your continued support, Primerica.



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