

Guide to Digitally Certifying your Proof of Identification and Address

STEP 1

You send us a scanned copy or picture of your **Identity Document/Passport/Drivers License** (must not be expired) and your **Proof of Address** (must not be older than three months and cannot be a PO Box address).

Your documents will then be sent internally to our **Compliance Department** (compliance@trustandpension.com) to start the process.



STEP 2



OTAP will contact you via phone or email to book an appointment for a live video meeting with a trained staff member.

Please note: Once notified internally, it will take between 24 to 48 hours for us to contact you.

STEP 3



You can request a day and time and we will send you an invitation via email which will contain a **6-digit code, instructions** and a link to a **Zoom meeting**. Please keep your 6-digit code on hand.



XX-XXXX



STEP 4



Before the meeting begins, please make sure to have your **6-digit code** with you as well as your **Identity Document/Passport or Drivers License** and Original **Proof of Address**.

XX-XXXX

1



2



3

STEP 5

When the meeting starts, one of our friendly staff will ask you for your 6-digit code. Once confirmed, they will ask you to hold up your **ID or Drivers License** next to your face followed by your **utility bill**. The photo in the ID needs to be **clear** and all information needs to be **legible**. We will then certify your documents internally.



NOTES

If you are **unable to use Zoom**, we can assist by using other Applications.

Please note that the call must be done via an Application that uses video, as we need to see your face.



We will not be recording the meeting.