

# 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** to start the process.



## STEP 2



OTAP's **Compliance Department** 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 a 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.



**Please note:** We WILL be recording the meeting.