

## Investia MS Office 365 – Frequently Asked Questions (FAQ)

**1. Is it mandatory to transition to Investia’s MS O365 platform?**

Yes, it is mandatory for all Investia advisors and their teams to transition to the Investia MS O365 platform. This platform offers several compelling advantages, including enhanced productivity, improved security and scalability within your office. MS O365 has integrated applications such as Word, Excel, PowerPoint, Outlook and Teams. In addition to this, tools like OneDrive and SharePoint enable multiple users to collaborate on documents simultaneously, improving efficiency and teamwork. Most of all, MS O365 incorporates AI-driven features like Copilot, which can assist with drafting emails and communications, automating routine tasks, and ultimately enhancing efficiency, thus allowing advisors to focus on strategic initiatives and drive business growth. The Investia MS O365 platform will serve as the foundation for the development of AI functionality to support the automation of key processes within your office.

**2. I already have a subscription for O365 with another provider, how will this impact my transition to Investia’s platform?**

You may keep your other subscription in place in addition to having the Investia MS O365 platform. However, it is encouraged that you cancel your current subscription and move over to the Investia platform.

**3. I have paid in advance for my subscription for several years, will Investia reimburse these costs?**

No, we will not be reimbursing prepaid subscription costs.

**4. Do I have to change my email address to @iainvestia.ca domain? My clients know my email address and I don’t want to have to change it.**

No, your email address does not need to change. If you have registered your own email domain, i.e., [name@tradenname.com](mailto:name@tradenname.com), you can transition this address under the Investia MS O365 domain. However, if you are using an email service such as Gmail, Yahoo, etc., you will need to start using an @iainvestia.ca email domain.

**5. My office does not use MS Outlook for emails, will we have to change over?**

At present, you may use the email client of your choice. However, to leverage the full capabilities of our platform and to maximize compatibility, it is strongly recommended to use Outlook as your email client.

**6. Is there any concern about the end of support for Windows 10 this fall?**

We anticipate that Microsoft will end their support for Windows 10 in October 2025. We strongly recommend coordinating with your current IT provider to plan an upgrade. Upgrading will allow you and your team to benefit from enhanced security, improved performance, better compatibility, and, more importantly, continued support and updates on your workstations. As a best practice, it is recommended to always use supported versions of all software.

**7. I have my insurance and tax business on the same platform that I use today, are there privacy concerns and will Investia have access to this information?**

All the data that flows through the Investia MS O365 platform will reside within the Investia/iA-owned MS O365 environment/tenant. The cloud storage will feature robust encryption, access controls, compliance standards, redundancy and backup systems, as well as comprehensive monitoring and threat detection, consistent with reputable cloud storage providers.

A new agreement outlining privacy guidelines and regulations will be provided to each of you for review and signature. Investia will reserve the right to monitor in accordance with CISO requirements.

**8. Can we bring our current data that we have in O365 over to the Investia platform, including SharePoint files? Is there a cost to this?**

We will have the ability to transition data from your current O365 installation to the new platform. We are working with Solulan and will provide further communication shortly. Solulan will be providing transition support to all advisors moving to the Investia platform.

**9. We are not currently using O365, can we bring our current data over to the Investia platform? Is there a cost to this?**

We expect Solulan will have the ability to transition data from your current system to the new platform. Each case will be reviewed on an individual basis. While no fees are expected for standard transitions, additional costs may apply depending on the complexity of the migration.

**10. Will we remain with Calligo as the provider?**

We have recently completed a request for proposal (RFP) investigating multiple providers to ensure we partner with an experienced vendor to guarantee a seamless launch/transition to the new Investia platform. We are pleased to announce that we have made a strategic decision to transition the administration of our MS O365 platform to Solulan. This change is aimed at enhancing the support for your current business, and we are excited about the opportunities it brings.

**11. What is the timeframe for advisors to have MS O365 set up and running?**

We aim to start deploying the new Investia platform after the Best Business Practices Roadshows in June. However, the transition will take time, and we will be contacting you shortly to ensure a smooth and gradual onboarding.

**12. We currently use Mac computers in our office, is this going to be a problem?**

Microsoft O365 is supported within the Mac operating system. There are some O365 features that may not be available in a Mac environment.

**13. What will the monthly cost be?**

As Louis mentioned during our Water Cooler sessions, there will be a new monthly IT fee for all advisors. Our plans will include an à la carte offering based on user consumption of services and/or software licenses. To ensure transparency of fees, the license and support fees according to the options selected (à la carte) will be billed on a separate deduction line. Details will be provided at the Best Business Practice Roadshows.

**14. If I leave Investia, can I take my data/files with me?**

Yes, we will ensure that Solulan will support this in accordance with applicable regulatory requirements.

**15. Will Investia be providing training materials on the new platform features?**

Yes, as these tools are unique to Investia, we will provide comprehensive training materials to support you.

**16. Our office is currently using the Google suite of services, and we have invested a lot of time in building workflows, calendars, emails, and tasks. Will we need to transition to Microsoft, or can we use both? Can the two systems operate on the same computer?**

The new Investia platform will be built within our MS O365 environment. To access its functionality, you will have to subscribe to the Investia MS O365 environment. It may be possible to transfer some of your current functionality from the Google suite of services to our MS O365 platform. If your PC is running Windows, you should be able to operate both systems on the same computer.

**17. I am concerned with allowing Investia, through Solulan, to host my email address as I do not want my communications monitored by Investia.**

All communications between you and your clients form part of the books and records for which Investia is responsible. At present, CIRO has not mandated email monitoring for former MFDA members, however, this will be part of the harmonization of CIRO rules moving forward. This rule has been in place for former IIROC members for some time. Rest assured that Investia staff does not have access to your emails or any other data on the Investia MS O365 platform. Email monitoring is facilitated by a software tool and is restricted to a “keyword” search to identify the potential use of undisclosed outside activities.

**18. Will Investia have access to my client files when I use Investia’s MS O365 platform?**

No, Investia will not have access to your client files, rather we monitor email correspondence as outlined in question 17.

**19. If I continue to use my own platform, will I be charged fees for Investia’s MS O365 platform?**

Yes, all advisors, licensed staff and branch employees requiring access to the Investia MS O365 platform will be charged an IT fee. Details about the service tiers will be communicated at the Best Business Practice Roadshows.

**20. Can I use my email domain that Investia is hosting and/or the iainvestia.ca email address for both my Investia and my insurance business through my MGA?**

Yes, if you have signed our Software Access Agreement, you can utilize either the email domain we are hosting on your behalf or the iainvestia.ca email address for both.

**21. Will email data stored in Investia’s MS O365 platform be backed up?**

Yes, all the information will be backed up daily by Solulan.

Email scenarios – For those **not** already on Investia’s email tenant:

#### Scenario 1

**Using a personal email domain (e.g., @gmail.com, @rogers.com, @yahoo.com @videotron.com, etc.) for business**

You must transition to the iainvestia.ca email domain, administered by Solulan, for all business conducted through Investia. Your new iainvestia.ca email address will also be required for accessing the Advisor Centre and future Investia features.

#### Scenario 2

**Using a custom email domain (trade name) for business, which is hosted by a third party**

You can opt to allow Investia, through Solulan, to host this domain, in which case it would be business as usual. You will also have access to the iainvestia.ca email address that you could utilize at your discretion. Alternatively, you could proceed as above and utilize the iainvestia.ca email address exclusively. For access to the current Advisor Centre and future Investia features, including SSO (single sign on) functionality, you may continue to access these resources by logging in with your current email address. However, the preference would be for you to login using the iainvestia.ca email address that has been provided.

#### Scenario 3

**Using a custom email domain (trade name) for business without wanting it to be hosted by Investia through Solulan**

In this case, you will receive an iainvestia.ca email address administered by Solulan and you must transact all Investia business through this email address. Other business can be run through your custom email domain and disclosed as an outside activity, where applicable. You will also need to transition your login credentials for Investia’s Advisor Centre and future features to your iainvestia.ca email.

#### Scenario 4

**Using a custom email domain (trade name) for business and taking advantage of the Google Suite of products (or another integrated platform) without wanting to abandon this platform**

You can allow Investia to host your domain through Solulan and continue to use the Google Suite of products, however, access to new services/tools offered by Investia would only be available by accessing our Investia MS O365 Platform outside your Google Platform through a separate login. For access to the current Advisor Centre and future Investia features, including the SSO (single sign on) functionality, you may continue to access these resources by logging in with your current email address. However, the preference would be for you to login using the iainvestia.ca email address that has been provided.