



# Supporting your Business in 2012

Service initiatives that make a REAL difference

## Acceptance of Scanned Application Forms & Other Documents

We conducted a survey in late 2011 to gain a better insight into what is most important to you, our Brokers. From the large number of responses received, a clear common theme prevails – that the acceptance of scanned application forms is very important to you!

In response, we will accept scanned application forms **in place** of original forms submitted by post. This development is a step forward in facilitating faster, more efficient business turnaround! We will also accept PDFs of almost all other documents that you would normally send in to us by post.

This is just one of many steps that we are taking in 2012 to make life easier for you and we welcome any feedback that you have! Simply talk to your Broker Consultant or your dedicated Sales Support Team!

### Why Scan?



#### Faster Turnaround

We receive the application form instantly and can start processing it straight away!



#### Peace of Mind

You no longer need to worry about important documents getting lost in the post. Plus you will get confirmation to reassure you that we have received your email.



#### Save Money

Helping you reduce your postage and stationery costs.

Just scan,

attach and email:

[proposalforms@zurich.com](mailto:proposalforms@zurich.com)

No need to post original into us!

MAY 2012

See Overleaf ►

# How the system works



We now consider emailed applications as true and complete copies of the paper applications your clients complete and sign.

We are happy to accept scanned application forms in **PDF format** for all of our products, just send them straight through to our [proposalforms@zurich.com](mailto:proposalforms@zurich.com) mailbox.

**Online proposals** should be submitted through our website as usual and can now be followed up with a scanned PDF, we don't need the paper version!

**IMPORTANT!** There is no need to send us the original application form once submitted by email as posting it in could actually slow us down (we would have to crosscheck the information on both forms to ensure all the details matched and clarify any differences).

## Other documents accepted as scanned PDFs

Please see below the list of documents now accepted in PDF format. If any of these documents are required at new business stage please submit them as for the application form.

Any other documents, for example an encashment claim form, can be emailed to

[existingbusiness@zurich.com](mailto:existingbusiness@zurich.com) Remember, you do not need to send the original in the post to us.

Your Broker Consultant or dedicated Sales Support Team are available to answer any questions you have on this new process. We are sure this will make it even easier for you to do business with us!

## Accepted documents

Requirement	Can we accept PDF?	Only accepted if
New Business/Underwriting		
All Medical Evidence	Yes	
AML Requirements	Yes	Certified by Broker
Birth Certificate	Yes	Certified by Broker
Broker Instructions	Yes	
Client Instructions	Yes	
Client Underwriting Questionnaires	Yes	
Declaration of Health	Yes	
Deed Poll	Yes	Certified by Broker
Direct Debit Mandate	Yes	
Driving Licence	Yes	Certified by Broker
Marriage Certificate	Yes	Certified by Broker
Original Pension Adjustment Order	Yes	Certified by Solicitor
Passport	Yes	Certified by Broker
Power of Attorney	Yes	Certified by Broker
Retirement Investment Certificate	Yes	
Special Terms Letter	Yes	
Trust Form	Yes	Certified by Broker

# Accepted documents (continued)

Requirement	Can we accept PDF?	Only accepted if
<b>Encashments/Maturities/Claims</b>		
All Medical Evidence	Yes	
AML Requirements	Yes	Certified by Broker
Birth Certificate	Yes	Certified by Broker
Broker Instructions	Yes	
Client Instructions	Yes	
Deed Poll	Yes	Certified by Broker
Dormant Account Claim Form	Yes	
Driving Licence	Yes	Certified by Broker
Encashment Claim Form/Request	Yes	
Expat Encashment Instruction Form	Yes	
Expat Residency Declaration Form	Yes	
Health Claim Forms	Yes	
Lost Policy Declaration	Yes	
Marriage Certificate	Yes	Certified by Broker
Original Pension Adjustment Order	Yes	Certified by Solicitor
Passport	Yes	Certified by Broker
Pension Maturity Claim Form	Yes	
Power of Attorney	Yes	Certified by Broker
Retirement Investment Certificate	Yes	
Statement of Claim	Yes	
Tax Forms (P60, P45) as proof of salary	Yes	
<b>Policy Alterations</b>		
Birth Certificate	Yes	Certified by Broker
Broker Instructions	Yes	
Change of Address	Yes	
Client Instructions	Yes	
Deed Poll	Yes	Certified by Broker
Direct Debit Mandate	Yes	
Driving Licence	Yes	Certified by Broker
Group Pension Trust Deed/Rules	Yes	
Letter of Authority	Yes	
Lost Policy Declaration	Yes	
Marriage Certificate	Yes	Certified by Broker
Original Pension Adjustment Order	Yes	Certified by Solicitor
PAP Increase or Decrease in Premium/Benefit Form	Yes	
Passport	Yes	Certified by Broker
Power of Attorney	Yes	Certified by Broker
Switch/Redirection Form	Yes	
Trust Form	Yes	
<b>Assignee Requirements</b>		
Assignee Indemnity Form	Yes	
Deed of Assignment	Yes	
Notice of Assignment	Yes	
Release Deed of Assignment	Yes	

*Remember!!  
No need to  
post original  
into us!*

See overleaf for some documents we cannot accept...

## Items we cannot accept in scanned format

Death Certificate  
Grant of Probate  
Tax Forms (P45) for annuity payment

## Acceptance of Scanned Application Forms & Other Documents

### Do's

- ✓ Available for all products.
- ✓ Submit in PDF format.
- ✓ Ensure all pages of the application form are included in the scan.
- ✓ Ensure the quality of the scan is legible.
- ✓ One scan per application form where possible.
- ✓ Scanned Direct Debit Mandate is accepted.
- ✓ Keep the original copy of the application form on the client file.

### Don'ts

- ✗ Post the completed application form to us.
- ✗ Attach other unrelated documents when submitting the scanned application form.



### Our commitment to you!

Our mission is to make life easy for you to administer your business with Zurich Life. We are committed to delivering 'best in the market' solutions to help enhance your business. We will continue to engage with you and act on your feedback to deliver on this objective.

### Have a query or some feedback?

If you have any queries or suggestions on how we can help, please do not hesitate to contact your **Zurich Life Broker Consultant** or your dedicated **Sales Support Team**.