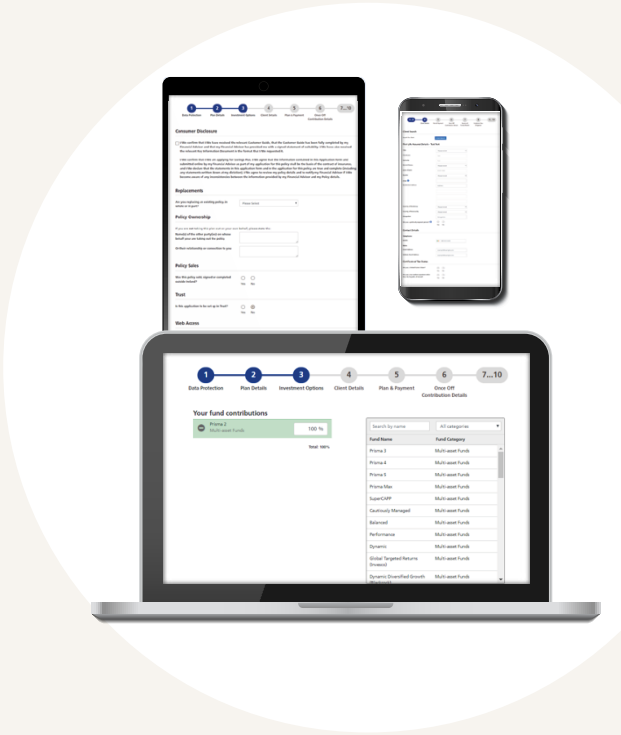
OnlineApply from Zurich

New ‘signature free’ Regular Savings plan available now



At Zurich, we’ve strengthened our regular savings proposition with the addition of a new innovative OnlineApply system that doesn’t require a traditional client ‘signature’. Available now, it’s ideally suited to the current working environment – enabling you to promote and transact savings with customers without the need to physically meet.

A new way of working

Zurich’s new OnlineApply incorporates a seamless digital consent facility into the application process.

OnlineApply removes the need for a ‘wet signature’ or the need for a digital signature provider such as Adobe or DocuSign – the client validation is completely wholly within the Zurich OnlineApply system.

The client can send their Anti-Money Laundering (AML) documentation by simply using the camera on their phone to scan the required documents to send to their Financial Broker. The AML evidence must then be uploaded by the Financial Broker via the OnlineApply system.

Zurich’s new OnlineApply for Regular Savings is now live – for more information, just visit ZurichBroker.ie or speak to your Zurich Broker Consultant.

OnlineApply for Regular Savings

Step 1

Ensure you've got the following ready to input:

- Client details – see data capture form for details required.
- The correct email address and mobile number for your client.
- Anti-Money Laundering (AML) documentation.
- Client bank details for Direct Debit mandate.

Step 2

Input client details and upload AML via OnlineApply for Regular Savings.

(For this step you could phone your client, chat with them face to face or ask the client to complete the data capture form prior).

Once submitted the OnlineApply system will send the completed application to the client.

Pssst – this is located in the Sales section of our secure site!

Step 3

The client receives an email link to the application form. For enhanced security a validation code will also be provided via text message to access the application form. The client checks the application, and if happy, validates and provides consent by the click of a button.

Step 4

Once the client provides consent, the application is automatically submitted to Zurich where it is processed.

Step 5

When securely logged in to zurichbroker.ie, you'll see the application in your "previous applications" tab in the Sales section. Here you can;

- check the status of the application,
- edit the application, or
- resend the application to your client.

A one-stop remote working solution from Zurich.

- Ideal for remote business.
- Traditional 'signatures' not required.
- Quick and easy to use.

Warning: The value of your investment may go down as well as up.
Warning: If you invest in this product you may lose some or all of the money you invest.
Warning: This product may be affected by changes in currency exchange rates.

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