

Online Apply

Client Approval steps for Signature Free Personal Pension

From: noreply@zurich.com <noreply@zurich.com>
Date: Tuesday, 19 July 2022 at 11:58
To: Tom Jones <tom.jones@email.com>
Subject: [EXTERNAL] **encrypt**Zurich Application Approval Required

Reference: 82329919

Dear Tom Jones,

Thank you for applying for a Zurich Life Single Premium Personal Pension Online policy with John Broker.
We are pleased to advise that your application is ready for you to review and approve.

Please use the link below to progress the application <https://ire-ie-dev2.rz.ch.zurich.com/verify/digitalConsent/start?>

If you have any questions please contact your financial advisor.

Kind Regards,
Zurich Life on behalf of John Broker



Step 1

Once your Financial Broker has input your policy details, you'll need to verify the details and 'digitally' sign the application.

You'll receive an email and you just click on the link to allow you to do this.



Step 2

Enter your phone number (the same number you provided during the application).

And click to Verify your number.

Zurich Life - Application Approval

Reference: **82329919**
Policy Owner(s): **Tom Jones**

Welcome Tom Jones

 085 012 3456

In order to protect your data please verify the mobile phone number you provided to your financial advisor.

Before continuing, please ensure that you have access to the phone, as we will be sending you an SMS code in the next step.

Enter a Valid Number



Step 3

Next, click 'Send code to phone'

This will send a 6-digit code to your mobile via text message.

Note: Once you receive the code, you will have ten minutes to input the code.

Zurich Life - Application Approval

Reference: **82329919**
Policy Owner(s): **Tom Jones**

Welcome Tom Jones

Please click below to receive a code by SMS to your mobile phone number +*****8991.

Note this code is for your use only. If there are other applicants they will receive a separate email and SMS.

Send Code to Phone



Zurich Life - Application Approval

Reference: **82329919**
Policy Owner(s): **Tom Jones**

Welcome Tom Jones

Please review the application form PDF below, by clicking on the "Review your application details" button.

Please save a copy of the application for your records using the "Download PDF" button. Note that Zurich will issue you with policy documentation once the policy has issued.



Very Important - Please Read

Once you have downloaded the PDF, a number of declarations will be shown. These must be completed before your application is approved.

The declarations shown on screen MUST be completed before your application is approved.

[Review your application details](#)



Step 4

After entering the code, click "review your application details". A PDF will appear in a new tab,



Step 5

The PDF that appears will include all your personal details. You must scroll to the bottom of the page and click "Download PDF".

After downloading you will be prompted to confirm if all the details on the PDF were entered correctly.

If any of your details are incorrect, simply click "no" and you will be given the opportunity to write a note to your Financial Broker outlining any errors.

Your Financial Broker will be able to make any amendments and then it will be resent to you for your final approval.



Step 6

If all the details are correct click "Yes", tick to confirm the declaration statement and click "Approve Application"

The application is then automatically submitted to Zurich.

Zurich Life - Application Approval

Reference: **82329919**
Policy Owner(s): **Tom Jones**

Welcome Tom Jones

Please review the application form PDF below, by clicking on the "Review your application details" button.

Please review the application form PDF below and download a copy for your records by clicking on the "Download PDF" button.
Once you have finished reviewing the PDF, you MUST complete the declarations on this page to approve your application.

Application Form



Personal Pension

For Application Approval

Note to Financial Advisor

As you are submitting online, we do not need to receive the data capture form and it should NOT be sent to Zurich Life as we will process the application based on the details you provide online.

In submitting an application online, you declare that the information provided online on behalf of the applicant(s), is provided with their authority and accurately reflects the information that was provided to you by the applicant(s) (including any information provided to you on a data capture form) and that Zurich Life can rely on the information provided once the applicant(s) has provided their approval.

If you are not submitting online then the paper application form should be used.

Please download the PDF using the button below to continue the approval process.

[Download PDF](#)

Are all the details as outlined in the application form correct?

Yes

No

I, Tom Jones, confirm that the information contained in the application is accurate and complete, that I have read and fully understood all of the above declarations and that I now wish to approve this application

☒ Tick to confirm

[Approve Application](#)

Zurich Life - Application Approval

Reference: **82329919**
Policy Owner(s): **Tom Jones**



Thank you for approving your application.

Your application has been submitted to Zurich Life for processing.

Your Reference Number is: **82329919**

You may now close this window.



For more information, please contact your Financial Broker.

Zurich Life Assurance plc

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