

OnlineApply from Zurich

New Signature Free Personal Pensions

We're delighted to announce the latest addition to our Signature free 'OnlineApply' offering – Single Premium Personal Pensions.

Built on the same platform as our signature free Savings and Income Protection products, this is a quick, easy, and innovative way to submit business to Zurich.

Ideally suited to the new modern way of working, the application can be completed online from start to finish without the need to meet your client in person.

Earn an additional

€100

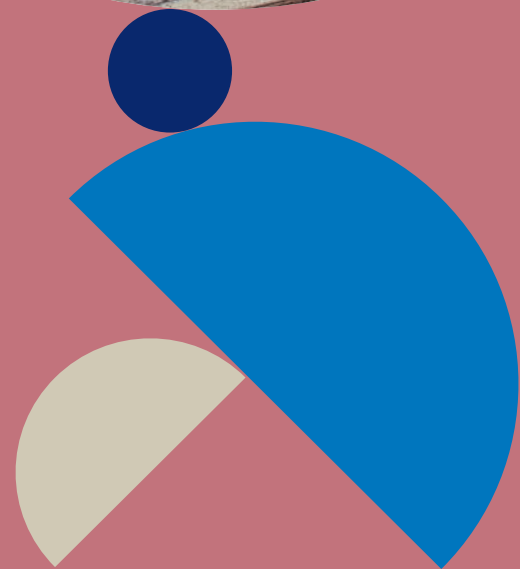
bonus payment
for proposals
submitted online*

OnlineApply is currently only available on new Single Premium Personal Pensions, including transfers from other life offices.

Top-ups can be submitted using the new system or you can continue to complete the single premium top up template.

New Regular Premium Applications with a Single Premium attaching: Please continue to use the regular online application process i.e Completing and uploading the Personal Declaration as before.

*New customers only. A minimum premium of €5,000 applies and the bonus payment does not apply on top ups to an existing policy. Please contact your contact your Broker Consultant for full terms and conditions.



Signature Free OnlineApply for Personal Pensions

Step 1 - You

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.
- Transfer payment details (if applicable)

Step 2 - You

Input client details

(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 your client for approval.

Step 3 - Your Client

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 downloads the application. Once they're happy the details on the PDF are correct, all they need to do is confirm the declaration statement and **click "Approve Application"**.

Step 4 - Zurich

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

If this policy is expecting a transfer payment from another life office - a 'Willing and Able' letter will be issued to the transferring life office as normal.

Step 5 - Zurich

New

Auto generated Willing and Able letters.

Once your client approves the application form, the willing and able letter is automatically available in your pipeline under the correspondence tab.

If you would like to issue the willing and able letter to the transferring life office in addition to transfer request forms, feel free to download a copy of the willing and able here.

Your service team will also issue this willing and able when reviewing the application.

Step 6 - You

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 'wet signatures' not required.
- Quick and easy to use.

For more information on how OnlineApply for Personal Pensions works, just speak to your Zurich Broker Consultant.



Zurich Life Assurance plc

Zurich House, Frascati Road, Blackrock, Co. Dublin, A94 X9Y3, Ireland.
Telephone: 01 283 1301 Fax: 01 283 1578 Website: www.zurich.ie

Zurich Life Assurance plc is regulated by the Central Bank of Ireland.