

OnlineApply from Zurich

New Signature Free PRSA

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

Built on the same platform as our signature free Personal Pensions, 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 new proposals
submitted online*

OnlineApply is currently only available on new Single Premium PRSAs, including AVCs and 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/salary deducted PRSAs: Please continue to use the regular online application process i.e. Completing and uploading the Personal Declaration as before.



Signature Free OnlineApply for PRSAs

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
(For transfer payments).**

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

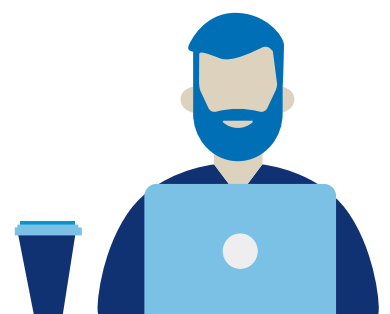
When securely logged in to zurichbroker.ie, you'll see the application in your "previous applications" tab in the Sales section. Here you can;

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

Terms and Conditions

- Minimum premium €5,000 with a minimum term to Normal Retirement Age of 2 years.
- This bonus applies to new Zurich customers only. It does not apply on top ups to existing policies.
- Bonus payments will be paid in the month following policy issue.
- Only one bonus payment is made per policy/client.
- The Bonus Payment does not apply to any other products.
- Zurich reserves the right to withdraw this incentive at any stage.
- Only cases submitted before 28 February 2023 will be eligible for the bonus payment.
- The bonus does not apply to Zurich replacement cases.

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



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