

# Submitting applications to Zurich

Declaration upload, Signature Free or Offline. Find out below.



Most Zurich products can be submitted Online. Depending on the actual product, there are slightly different approaches.

- **Online:** Declaration upload – you can key the clients onto the Zurich system, and upload a copy of the clients signed declaration.
- **Online:** Signature Free – you can key the clients details onto the Zurich system, and the client will receive a link to review and approve the application without requiring a signature.
- **Offline:** There is no online journey currently available, so simply email the application to Zurich.

Protection	Online	Declaration upload	Signature Free	Offline (Paper/PDF completed and emailed to Zurich)	Digital Signature accepted
Guaranteed Term Protection	✓	✓	✗	✗	✓
Guaranteed Mortgage Protection	✓	✓	✗	✗	✓
Income Protection	✓	✗	✓	✗	✗
Cancer Cover	✓	✓*	✗	✗	✓
Pension Guaranteed Term	✓	✓**	✗	✗	✓
Guaranteed WOL	✗	✗	✗	✓	✗
Business Insurance	✓	✓†	✗	✗	✓

Saving and Investment	Online	Declaration upload	Signature Free	Offline (Paper/PDF completed and emailed to Zurich)	Digital Signature accepted
Regular Savings/ Regular Savings with SP	✓	✗	✓	✗	✗
Investment Bonds	✓	✗	✓	✓	✓
Child Savings	✗	✗	✗	✓	✗
Corporate Investment Bond	✗	✗	✗	✓	✓

\* Apply for Cancer Cover using the Term Protection Application

\*\* For Pension Term, the full application form should be provided by email.

† For Business Insurance, the full application form should be uploaded online.



Pensions	Online	Declaration upload	Signature Free	Offline (Paper/PDF App completed and emailed to Zurich)	Digital Signature Accepted
Personal Pension SP Only	✓	✗	✓	✗	✓
Personal Pension RP/RP including SP	✓	✗	✓	✗	✓
Master Trust Executive Pension	✗	✗	✗	✓	✓
Personal Retirement Bond	✗	✗	✗	✓	✓
Standard PRSA/PRSA AVC/PRSA Transfer (SP Only)	✓	✗	✓	✓	✓
Standard PRSA RP/RP including SP	✓	✗	✓	✓	✓
Advice PRSA/PRSA AVC/PRSA Transfer (SP Only)	✓	✗	✓	✓	✓
Advice PRSA RP/RP including SP	✓	✗	✓	✓	✓
PRSA Salary Deducted	✓	✗	✓*	✓	✓
Multi PRSA	✗	✗	✗	✓	✓
Self Directed	✗	✗	✗	✓	✓

\* The only application which must be submitted offline are Salary Deducted Single Premium PRSAs (without a regular premium attaching) or where the employer does not remit contributions by Direct Debit.

At Retirement	Online	Declaration upload	Signature Free	Offline (Paper/PDF completed and emailed to Zurich)	Digital Signature accepted
ARF	✗	✗	✗	✓	✓
Pension Annuity	✗	✗	✗	✓	✓



#### Approved Digital signature providers:

- DocuSign
- AdobeSign
- NitroSign
- OneSpan
- Dropbox Sign (formerly HelloSign)

Note: Each digital signature must be accompanied by a corresponding digital certificate.

#### Zurich Life Assurance plc

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