

Zurich's DC Portal

– Adding New Members

With Zurich's online portal, you're fully in control. It provides you with all the information you'll need to manage your pension scheme at scheme and member level. You get instant access to key services including payroll, pre-renewals, member updates, and now adding new members.

Using the portal to add a new member to your existing Zurich group scheme is easy and is completed online from start to finish.

With no member 'signatures' required, it's fast, straightforward, and once the application is submitted, the member will get their new policy number straight away.



Step 1 – You (Employer/Advisor)

Log on to your scheme on the Portal then simply select “Add New Member” to start the process. You input the below member information:

- The email address and mobile number for your member.
- The month of first contribution from your members payslip.

Employers will be asked to provide additional employment details such as employee number, annual salary, PPSN, and employment start date.

Contribution Details are an optional input at this step of the process. These will be confirmed by your member when completing their application form.

Once this information is submitted, the system will send your member an email containing a link to their application form.

Step 2 – Your Member

Your member receives an email link to the application form. For enhanced security, a validation code will also be sent by text message to access the application form. The new member then completes the short application online.

Once they're happy the details in the form are correct, all they need to do is confirm the declaration statement and click “Approve Application”.

They will then receive their new policy number and a PDF copy of their application form.

Step 3 – Zurich

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

If the payment method is by fixed Direct Debit the policy will issue straight away, if the payment method is EFT it will issue once the funds have been received. You will need to remember to include the payment for this member in the EFT.

Step 4 – You

You can keep track of the application status in the History section on the Portal. You can check the status of the application, edit the application, or resend the application to the member. The link will expire after 7 days if it not completed by the member.



This journey is for new members into existing Group Schemes only. Please contact your Scheme Advisor for full terms and conditions.

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