ZURICH

New Member Journey

Adding a new member to an existing Zurich group scheme



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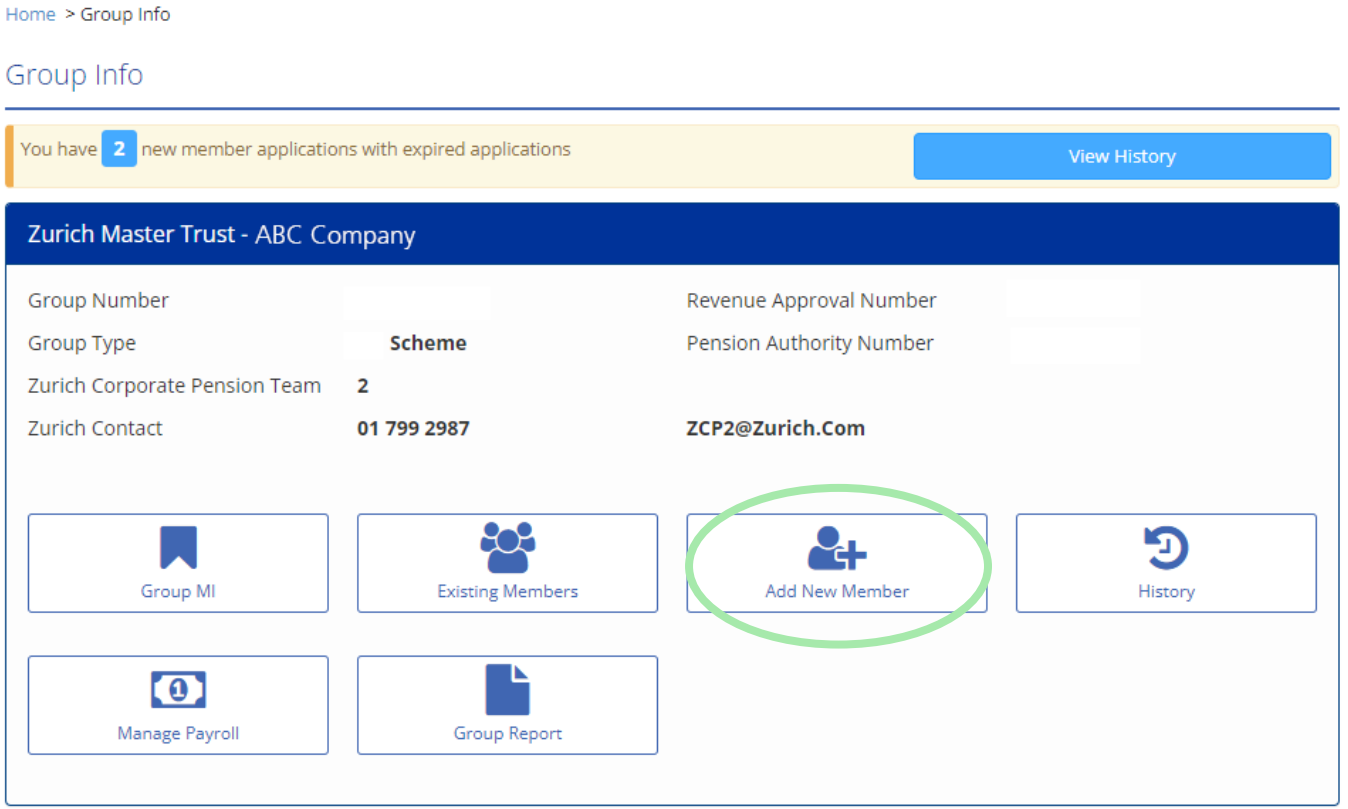
Getting started

Log on to the DC Portal through the Zurich Broker Centre.

Enter the scheme number for your chosen group.

Here you will see a new button, labelled 'Add New Member'

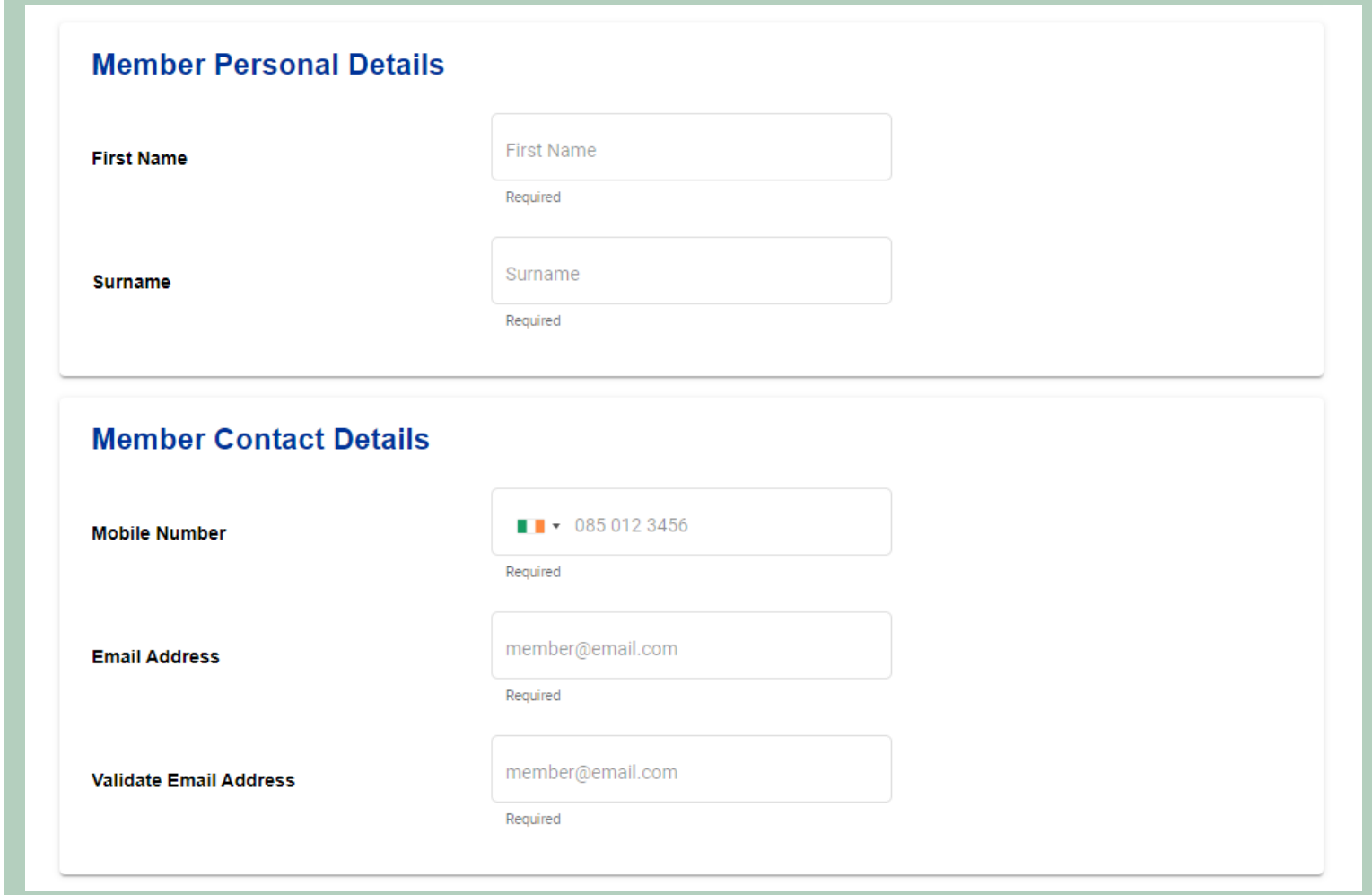
Clicking this button will begin a new application process for a new member.



Once you have entered the necessary information, simply click submit and this application will be sent to the member via email to be completed.

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Adding Your Member



An employer will need to fill in the following information:

- The new member's name
- Their mobile number
- Email address
- Employee Number (if required)
- Annual Salary
- PPSN
- Start date of employment
- The month the first contribution will be taken from the members payslip

Contribution details are optional and can be confirmed by the member when completing their application.

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The member will receive an email

From: noreply@zurich.com
To:
Subject: ABC Company Pension Application completion required

Reference: 2272 - 3152

Dear Niamh

Your employer has advised us that you are eligible to join the ABC Limited company pension.

In order to join the ABC Limited company pension you will need to complete the following steps.

1. Verify your identity
2. Complete and approve the online application form

Please use the link below to begin the process to join the scheme

https://ire-ie-sit1.rz.ch.zurich.com/verify/requestValidation/start?validationId=1030&roleNo=1&secret=SZCKPRWNKXXEHINHIKJHLRCXCFKWIWZZOOCNHUPNFSKZQWTPNYJUGQSCCLMNGKWM

Please note this link will expire after 7 days. If your link has expired please contact your broker or employer to resend a valid link.

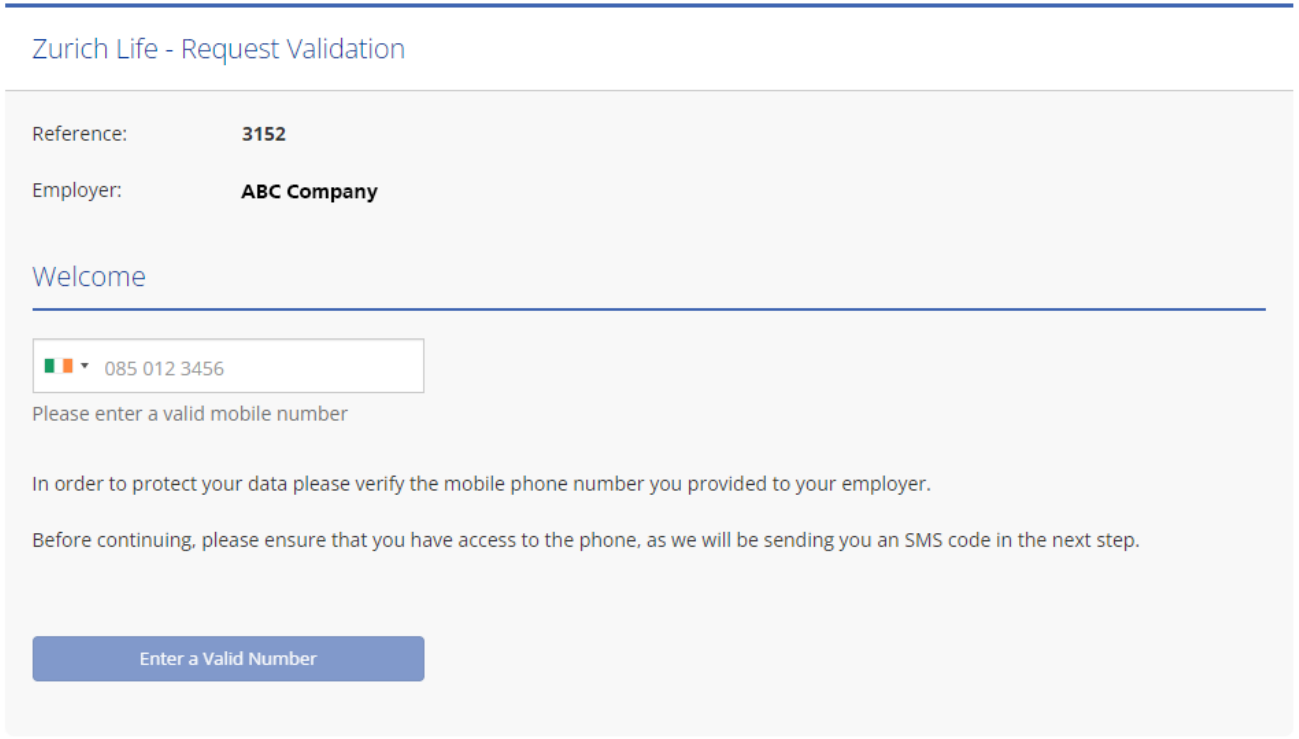
If you have any questions please contact your broker or employer.

Kind regards,
Zurich Life Corporate Pensions Team

The member will receive an email which contains a secure link to fill out the remainder of the application. The email will appear in this format from the email address noreply@zurich.com. Please note this link will expire after 7 days and will need to be resent to the member if they have not completed their application.

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The member journey



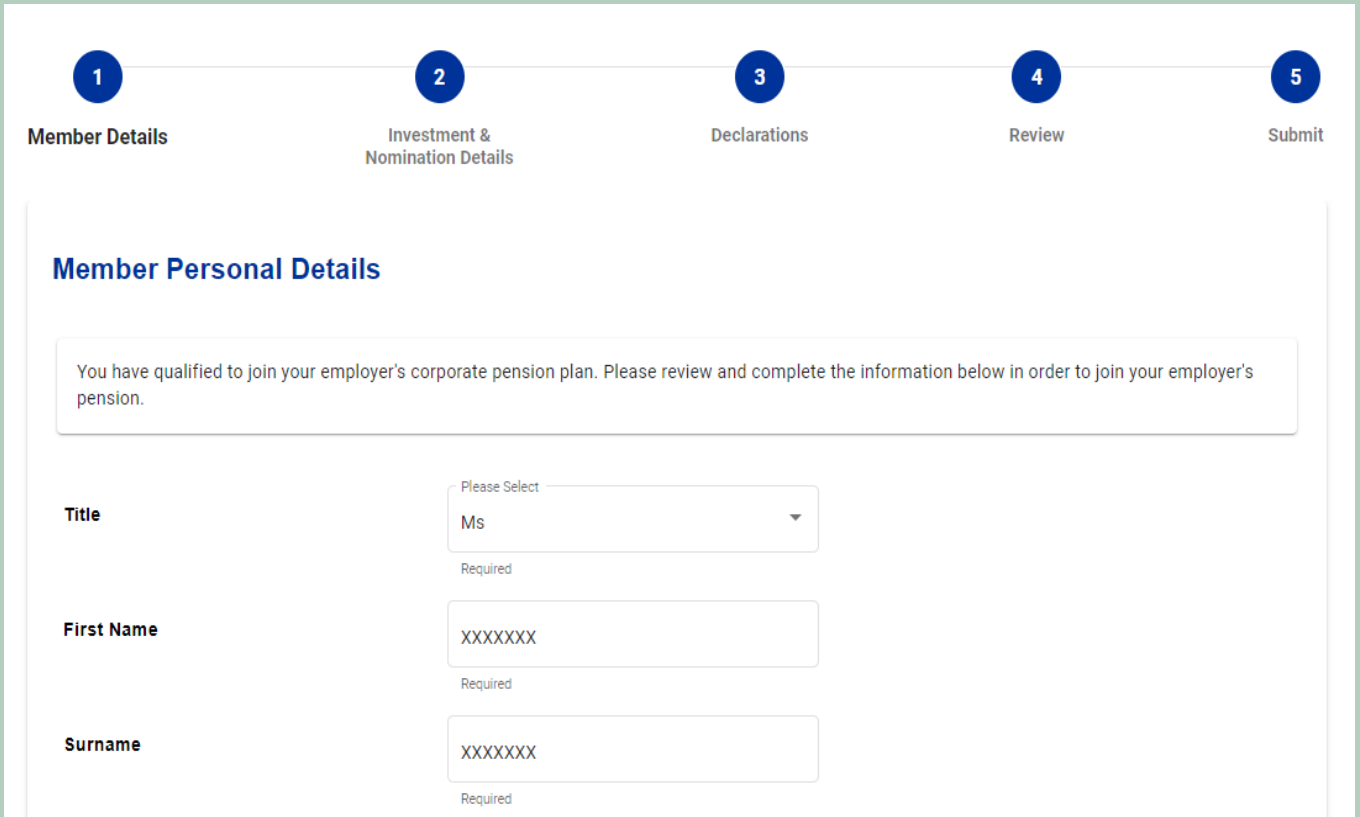
Once the Member clicks the link within the email, they will be brought to the online application.

The application will ask to verify their identity by confirming their phone number.

A second validation step will send a code to the member's phone number, and this will need to be inputted into the application.

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The member journey



There are **4 pages** to be completed. These pages refer to the member's details, Investment & Nomination Details, Declarations, and finally a Review of the Application.

The member can:

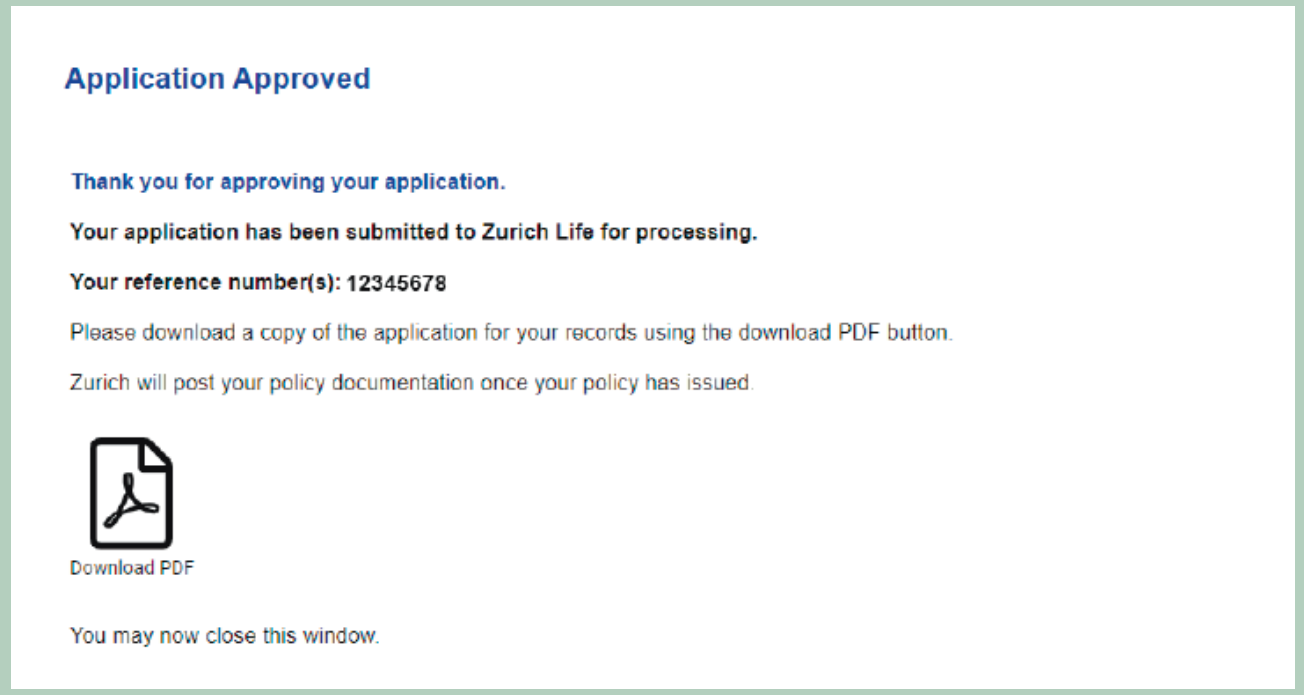
- amend any incorrect information inputted by the Employer
- choose if they wish to include any AVC contributions.
- nominate individual(s) for the trustee to pay any Death in Service lump sum payable

Declarations will ask the member to consent to our Data protection practices, additional permissions and various marketing practices.

On the Review page, the member can ensure the details they have submitted are correct. If a member needs to amend any detail, they simply go back to previous pages.

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The member journey

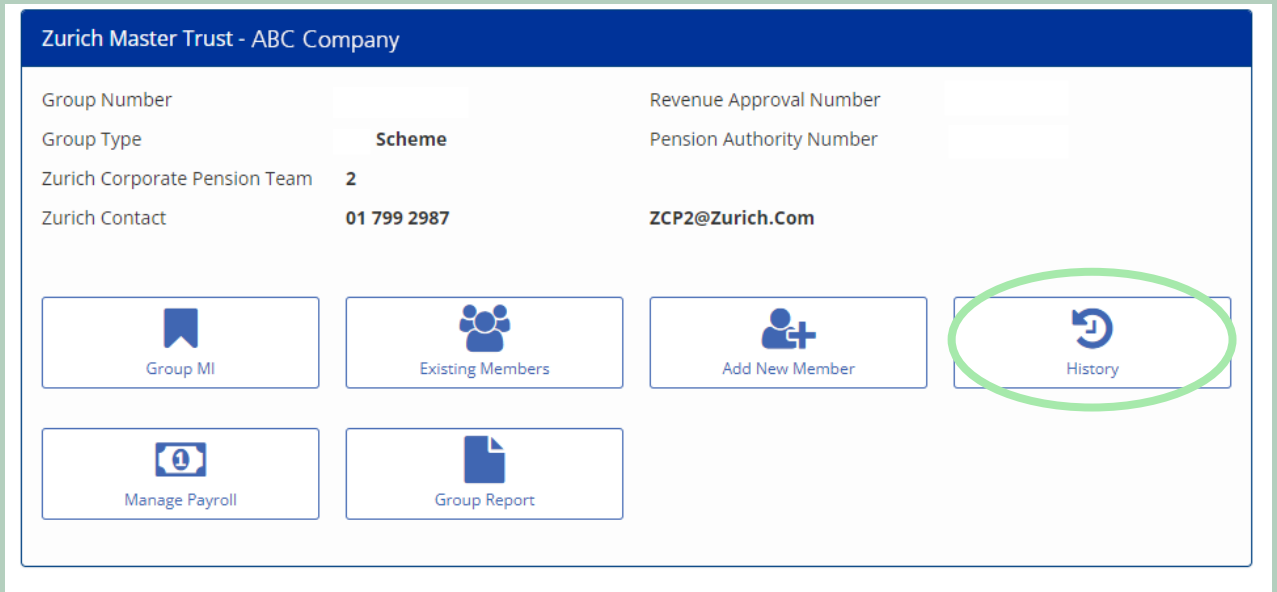


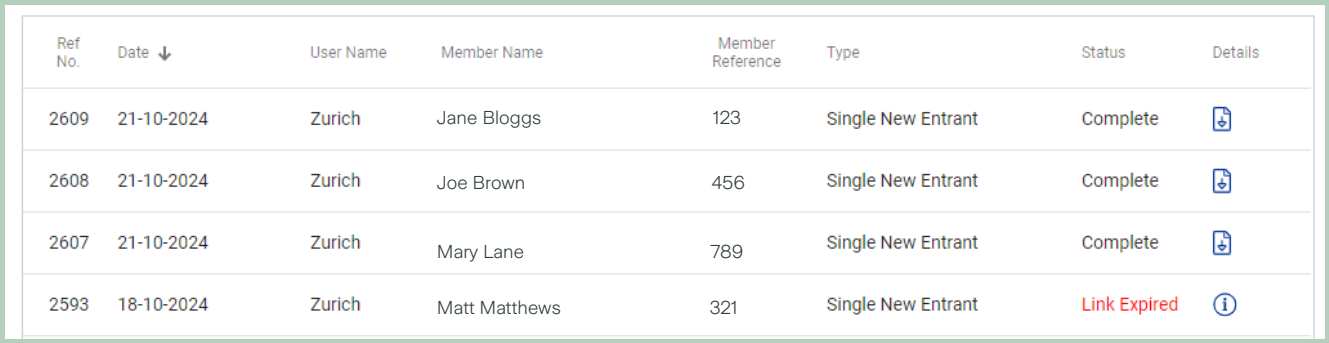
Lastly, the member needs to confirm that all details are accurate and complete. The member will then approve their application. At this point, they will be given their policy number. Once your member submits their application, it will be automatically submitted to Zurich to be processed.

Please note, policies paid via Direct Debit it will be processed straight away. Policies which are paid via EFT will not be processed until the funds are received, so it is important that Employers send across the contributions for EFT payments as soon as they can.

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Submitted applications





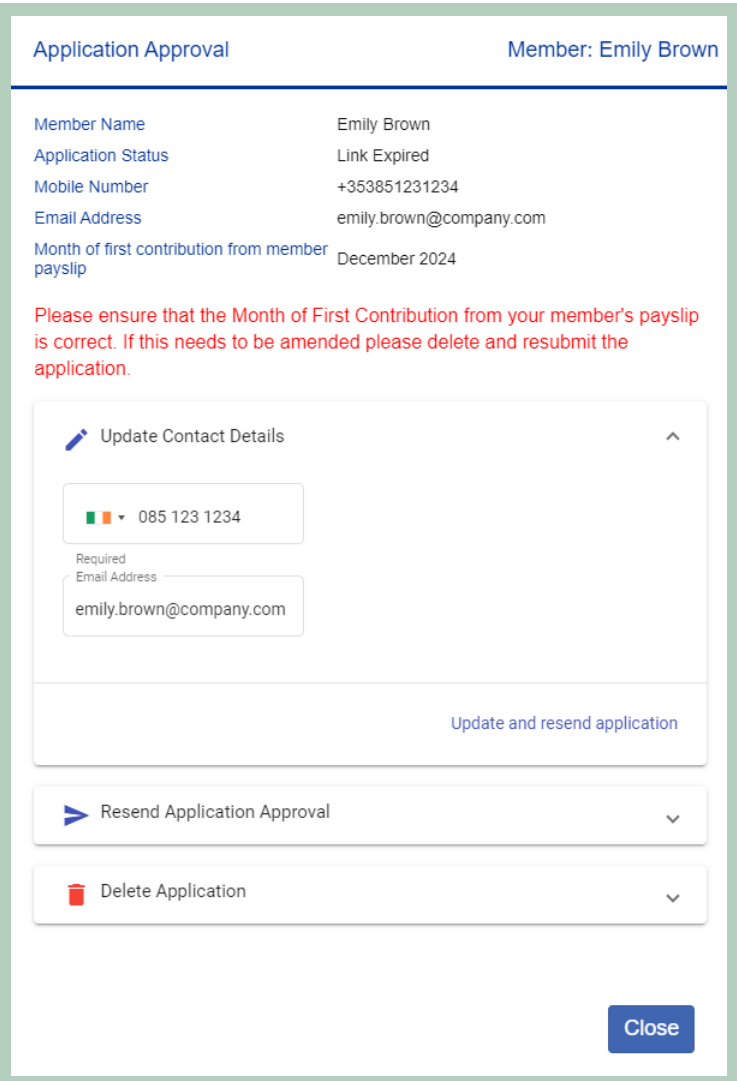
Ref No.	Date	User Name	Member Name	Member Reference	Type	Status	Details
2609	21-10-2024	Zurich	Jane Bloggs	123	Single New Entrant	Complete	
2608	21-10-2024	Zurich	Joe Brown	456	Single New Entrant	Complete	
2607	21-10-2024	Zurich	Mary Lane	789	Single New Entrant	Complete	
2593	18-10-2024	Zurich	Matt Matthews	321	Single New Entrant	Link Expired	

To view all applications which have been sent to members, simply click the History button which is to the far right of the centre of the screen on the DC Portal Dashboard.
All applications will have a status which details what step the applicant is at within the journey:

- If the member has completed their application, this is described as ‘Completed’
- If the member has not filled in their application, this is described as ‘Awaiting Member Completion’
- If a member application needs any further information or due diligence by Zurich, this will be described as ‘Waiting’
- If a member has not completed their application within the 7 day limit, this will be described as ‘Link Expired’.

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Submitted applications



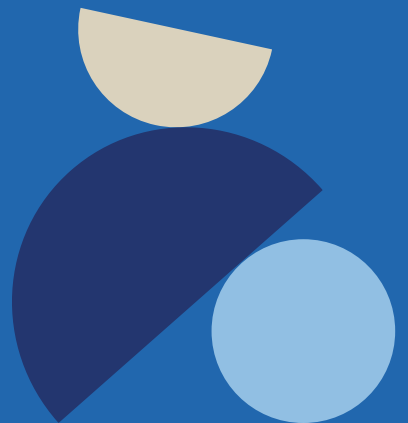
You can edit the application from the history page if an initial field was inputted incorrectly.
This can be achieved by clicking the (i) button beside the status description. Here, you can see the member's name, application status, mobile number, email address and the month of the first contribution that will be taken from the member's payslip.

You can amend the email or mobile for this application. From here the application can be resent to the member or deleted entirely.

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For More Information
Please contact your Broker Consultant or
Scheme Advisor who would be happy to assist you.



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