My Resolution Life How to Guide Requesting quotes

A step by step guide to requesting quotes online



Resolution Life

Step 1

- Log in to My Resolution Life
- Haven't used My Resolution Life before? <u>Learn more here</u>

Step 2

- Select [Quotes] in the left-hand menu
- Select [Existing policy] in the drop-down menu

Step 3

• Select or type in the client's policy number and select the returned result

Step 4

 Depending on the policy type, you will be directed to a selection window. Please select the relevant option and click [Next]

Manage		ervice request	Overdue notices	
Update			Official Holices	
Quotes	Customer Search			
New policy (Elevate online) Existing policy	Policy Search	3		 Recently Accessed I
Documents and forms	Policy or Contract number	3		
Statements and correspondence	Enter a policy or contract number			
statements and correspondence	Customer Name Search			
Quote request	for all policies alterations			
You can use this to request a quote Policy Details Policy number	Product Name Plan Owner			
You can use this to request a quote Policy Details Policy number P123456789 What can we help you you	Product Name Plan Owner Resolution Life Insurance Dmsih Niqaigg			
You can use this to request a quote Policy Details Policy number P123456789	Product Name Plan Owner Resolution Life Insurance Dmsih Niqaigg vith today?			
You can use this to request a quote Policy Details Policy number P123456789 What can we help you v (Select all that applies) Decrease insured am Increase insured amo	Product Name Plan Owner Resolution Life Insurance Dmsih Niqaigg vith today? ount			
You can use this to request a quote Policy Details Policy number P102456789 What can we help you tr (Select all that applies) Decrease insured arm Increase insured arm Alter waiting or benefit	Product Name Plan Owner Resolution Life Insurance Dmsih Niqaigg vith today? ount unt it period			
You can use this to request a quote Policy Details Policy number P123456789 What can we help you v (Select all that applies) Decrease insured am Increase insured amo	Product Name Plan Owner Resolution Life Insurance Dmsih Niqaigg vith today? ount unt it period			
You can use this to request a quote Policy Details Policy number P123456789 What can we help you v (Select all that applies) Decrease insured arm Increase insured arm Alter waiting or benefi Add or remove benefi	Product Name Plan Owner Resolution Life Insurance Dmsih Niqaigg vith today? ount unt it period			

Step 5

- Depending on the policy type, you will be directed to a selection window. Please select the relevant option and click [Next]
 - 5A Insurance premium calculator Decrease sum insured | Change
 - waiting/benefit period on IP
 - 5B My RL quote request form Increase sum insured | Most other types of quote enquiries

Please see more details for each option on the following pages.

5

	Quote request	all policies alterations			
	Policy Details Policy number P123456789	Product Name Resolution Life Insurance	Plan Owner Dmsih Niqaigg		
	What can we help you wi (Select all that applies)		1 00		
	Decrease insured amore	unt			
	Increase insured amou				
	Alter waiting or benefit				
	Add or remove benefits				
	Other				
	Back		Next		
Incorpression The Armon and Armon Armon and Armon		5	B Quote request You can use this to request a quote for a Policy Details Policy Details Polity 152462 Income Insurance Plan Life Insured Dmsh Niqadga Current Insured Amount 512,439.01	al policies alterations Product Name Resolution Life Insurance	Plan Owner Dmsih Niqaigg Remove
			Additional comments		
			Where would you like us to send	the quote? *	ħ.
			Do you need a premium projection	on?*	
		L	Back		Submit

5A Insurance premium calculator



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Step 5A

Insurance premium calculator & projections

 If you've been directed to the insurance premium calculator, follow the steps to obtain your premium calculation

The premium calculation tool allows you to complete the following quotes for CLAS AU + NZ:

- · Change waiting period on IP
- Change benefit period on IP
- Decrease sum insured + change waiting period
- · Decrease sum insured + change benefit period
- Decrease sum insured + change waiting period + change benefit period
- Decrease sum insured + change waiting period (upcoming anniversary quote)
- Decrease sum insured + change waiting period (upcoming anniversary quote)
- Decrease sum insured + change waiting period + change benefit period (upcoming anniversary quote)

You can either produce a quote or submit it on behalf of the client with applicable consents .



5B My Resolution Life quote request form



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Step 5B

My Resolution Life quote request form

- If you've been directed to the quote request form, complete all relevant fields
- You can add additional comments to your request in the free text field at the bottom of the form

5_B

Click [Submit]

Quote request	ote for all policies alterations	•	
Policy Details			
Policy number P123456789	Product Name Resolution Life Insurance	Plan Owner Mmfbl Tmpli	
Income Insurance Pl	an	Remove	
Life Insured Mmfbl Tmpli			
Current Insured Amount \$2,086.81		Edit	
Waiting Period 30 days		Edit	
Sickness benefit period 5 years		Edit	
Injury benefit period 5 years		Edit	
Life Insurance Plan		Remove	
Life Insured Mmfbl Tmpli			
Current Insured Amount \$171,033.94		Edit	1 Your request has been submitted
dditional comments			Your quote request has been submitted. For your reference, your request ID is 2100000134.
			We understand that many quotes need a quick turnaround and we mostly respond within 1-2 business days.
			If your quote is more complex it may take us 3 to 5 working days to complete. If you have any questions, please contact us through chat and quote 2100000134
Vhere would you like us to Enter email address	send the quote? *		Request another quote for this policy
Do you need a premium pro	ojection? *		Com
Yes No			
			Submit

Live-chat



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Live-chat

- In some rare cases, you will be directed to live-chat for your enquiry
- Follow the steps to chat directly with one of our consultants to enquire about the quote

Resolution L	.ife
Resolution Life - Virtual Assistant Ask me a question.	15:05
User (Adviser - W Please connect me with an agent	Sent at 15:05
Resolution Life - Virtual Assistant Would you like to connect to an agent?	15:05
User (Adviser - W Yes	Sent at 15:05
Resolution Life - Virtual Assistant Before we connect you to an agent, we few questions. What's your name?	15:05 e need to ask a
Type a message	
End chat	

If you don't have access to My Resolution Life



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Step 6

Online enquiry form

- If you don't have access to My resolution Life, you can submit your quote request <u>here</u>.
- Fill in all required details and click [submit]

Haven't used My Resolution Life before? Learn more <u>here</u>.

nline enquiry form		
Step 1: Policy details		
Policy details		
Policy number *		
Adviser details Adviser ID/Code *		
Your name	Your contact details	
First name *	Email address *	
Last name *	Phone number *	
	Mobile number	

Thank you

What you need to know

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