

The Adviser Portal

Adviser Training

March 2025



Contents



Home dashboard

- Dashboard
- Preferences



Quote, Apply & Alterations

- New Zurich Policy
- New OnePath Policy
- Policy Alteration/Projection
- Change of Ownership Application



Applications

- Applications in progress
- Tele-Interview booking tool



My Clients

- Client details
- Update payment details
- Policy details
- Provide Third Party Authority
- Cancel a policy
- Reinstate & Make a Payment



Portfolio Insights

- Birdseye view of your book across Zurich & OnePath



Renewals

- Track a variety of notices (Anniversary, Overdue, Cancellation etc)



Claims

- Lodge claims for Zurich & OnePath policies
- View claim information & assessor contact details



Service Requests

- Track open & closed Service Requests
- Submit New Requests



Tools & Resources

- Zone Education
- Reports
- Data feeds
- PDS & Forms



Multi Factor Authentication - MFA

- Extra layer of security, protecting yours and your client's data

Home Dashboard

New Policy Quotes

[+Create new quote](#)

Reference number	Life insured	Date of birth	Date last updated	Status
I192648635	John Smith	6/11/1987	31/1/2025	Quote
I059131587	Andrew Prior	6/1/1987	31/1/2025	Quote
I897945757	Fake Name	6/11/1987	31/1/2025	Quote
I462685557	Fake Fake	1/8/1989	31/1/2025	Quote
Q002885956	Donna Test	1/1/1990	21/1/2025	Unsubmitted application

[View more quotes >](#)

Applications

Life insured
uipath I000502717
uipathillus C0940002191
Jonathon Smith
Braxton Sponsler
uipathillus C0940002187

Claims

Claim No.	Policy No.	Claim type	Life insured	Policy owner	Status
C-2024-305924	03507227	Total and Permanent Disability	Mallory Pacheco	Mallory Pacheco	Notified
C-2024-306858	76136857	Income Protection	Jack Santos	Jack Santos	Notified
C-2024-306824	76170887	Income Protection	Caleb Bolton	Caleb Bolton	Notified
C-2024-306255	76082673	Income Protection	Alexander Bean	Alexander Bean	Notified
C-2024-306702	76106896	Death	Carmen Hensley	Carmen Hensley	Open

[View more claims >](#)

Renewals

- 0 Cancellation advice >
- 61 Approaching cancellation advice >
- 11 Overdue reminder >
- 0 Unsuccessful premium deduction notice >
- 1120 Anniversary notice >

Service requests

- 28 Open >
- 4 Recently completed >

● Access unsubmitted quotes & applications

● Track and manage applications in suspense

● Monitor ongoing claims

● Keep up to date with the various notices under Renewals

● Track open and closed Service Requests

● Set up notifications using the notifications panel, or by selecting "Preferences" from the top right drop down



Home Dashboard

Preferences



Preferences

My details | Security Preferences | Delegate my access | Access delegated to me | Notification preferences

My details

The details we hold about you are shown below.
Please update your details below and click on the 'Submit my changes' button.
If you have any queries, please contact Adviser Service on 1800 500 655 or adviser.service@zurich.com.au

Title	Email	Postal Street	
	andrew.prior@zurich.com.au	118 Mount Street	
First name	Administration Email		
Andrew	andrew.prior@zurich.com.au		
Last name	Secondary Email	Postal City	Postal State
Prior	andrew.prior@zurich.com.au	North Sydney	NSW
Phone			
0466410623			
Mobile			
0466410623			
Fax			

* NOTE: Updating your Mobile number and Secondary Email will also update your verification code for login

Preferences

My details | Security Preferences | Delegate my access | Access delegated to me | Notification preferences

Delegate your access to support staff

You can delegate your Adviser Portal access to another user so that they can assist you with administering your client portfolio.
These are the users you have delegated to. They can login as you.

Andrew Prior

David Prior	Delegate to new user
<p>Date Delegated</p> <p>22/11/2024, 10:14 AM</p> <p>Status</p> <p>Active</p> <p>Revoke</p>	<p>Username</p> <p><input type="text"/></p> <p>Delegate Access</p>

- Update contact details via "My details"
- Change password, update MFA preference
- Delegate access to other registered users so they can assist with administration
- Track who has delegated access to you
- Keep up to date by using the notification preferences tab

Quote, Apply & Alterations

Home **Quotes** Applications My clients Renewals Claims Service Requests Insights Tools & Resources

New Zurich Policy
New OnePath Policy
Policy Alteration / Projection

New Policy Quotes

+Create new quote

Reference number	Life insured	Date of birth	Date last updated	Status
1192648635	John Smith	6/11/1987	31/1/2025	Quote
1059131587	Andrew Prior	6/1/1987	31/1/2025	Quote
1897945757	Fake Name	6/11/1987	31/1/2025	Quote
1462685557	Fake Fake	1/8/1989	31/1/2025	Quote
Q002885956	Donna Test	1/1/1990	21/1/2025	Unsubmitted application

View more quotes >

Applications

Life insured	Date received	Status
Jonathon McJames	11/02/2025	Submitted
Jonathon McJames	11/02/2025	Submitted
uipath I000502717	11/02/2025	In Progress
uipathillus C0940002191	11/02/2025	In Progress
Jonathon Smith	11/02/2025	Submitted

View more applications >

- Access both Zurich & OnePath quoting software
- Single sign-on. No need for multiples logins when launching quoting software
- Create alterations & projections for inforce policies
- Generate and submit COO applications for eligible OneCare policies via Policy Alteration
- Submit reduction alterations on Zurich & OnePath policies

Saved quotes and unsubmitted applications

Live applications Create a new quote

Life insured search Quote ID search Status filter All v

Life insured	Reference number	Date of birth	Date last updated	Status	Client status
Andrew Prior	I171065032	06/01/1987	05/02/2025	Unsubmitted application	
Troy Lowrie	I005419397	14/05/1969	17/01/2025	Quote	
Andrew Junior	I700978391	01/05/2001	16/01/2025	Unsubmitted application	
Jane Prior	I314934382	24/12/1989	16/01/2025	Unsubmitted application	Waiting for client

Quotes Dashboard

Andrew Prior

John Smith

Andrew Prior

Andrew Prior

Andrew Prior

10 entries per page

Andrew Prior

38 year old Male, NSW, Non-smoker, \$100,000, Financial planner - degree and min 2 years exp (or no degree and 5 years exp), earning between \$100k-\$120k

Quotes

A.Prior-1 \$1,486.95
Protection Plus
Income Safeguard

Application

Contact Details

Ownership

Beneficiaries

Payment Details

Completion Method

Life Insured Statement

Submission

Confirmation

Active

A.Prior-1 Total \$1,486.95

Super Frequency: Yearly

Purpose: Personal only

Selection pricing: Lower upfront pricing

Smart Value Discount: Auto

Waive policy fee (AG):

IndeXation: Premium waiver:

Death Cover: Hide ^

Variable Age-Stepped: \$ 1,000,000

Annualised Total \$1,486.95

Continue to application

- Create Zurich quotes & applications via Zurich Life Quotes
- Pre-assess your clients using the online pre assessment tool
- Set preferences for your default quote & apply settings (Payment method, premium type etc)
- Multiple completion methods to choose from (Online, Tele-Interview & Client Completion)
- Submit applications without requiring a client signature

[+ Add New Quote](#)
[Recent Quotes](#)
[Applications](#)
[Incomplete TI/Client URL](#)
[External Quotes](#)

ⓘ Displaying recent quotes for Andrew Prior. Please note: alterations to existing policies cannot be processed using Illustrator. To obtain a quote for an alteration to an existing policy, please contact OnePath's Risk Adviser Services on 1800 222 066. ↻

Quote #	Lives	Status	Reference	Modified By	Modified On	Action
Q003316641	Fake Name	Incomplete Application		Andrew Prior	22 Jan 2025 02:46 PM	open delete
Q003316606	Andrew Prior	Incomplete Application		Andrew Prior	22 Jan 2025 02:23 PM	open delete
Q003313892	Andrew Prior	Quote		Andrew Prior	17 Jan 2025 11:48 AM	open delete
Q003268039	Fake Name	Incomplete Application		Andrew Prior	29 Nov 2024 09:54 AM	open delete
Q003278831	Andrew Prior	Incomplete Application		Andrew Prior	29 Nov 2024 09:34 AM	open delete
Q003278824	Andrew Prior	Quote		Andrew Prior	29 Oct 2024 10:37 AM	open delete
Q003278242	Jane Smith	Quote		Andrew Prior	29 Oct 2024 10:37 AM	open delete
Q003277090	Person 1	Quote		Andrew Prior	25 Oct 2024 09:36 AM	open delete
Q003265200	And					
Q003237862	And					

Life insured details for Fake Name

First Name: Fake | Surname: Name | Date of Birth: 1-Jan-1991 | Age: 34 | State: NSW | Gender: **Male** / Female

Employment Status: **Employed** | Principal Occupation: Accountant/auditor - degree qualified | Smoker: **Non-smoker**

Annual Income (excluding super): \$125,000 | Annual Super: None | Super Percent: % | Super Amount: \$

Existing OneCare: **Yes** / No | Continuation Option: Yes / **No**

[Existing Insurance](#) > [Pre-assessment/Loadings](#) > [Cover Summary](#) + [Add Covers](#)

Policy 1 - Non Super

Payment Method: Direct Debit | Payment Frequency: **Monthly** / Half-yearly / Annually | Policy Type: Create a new policy

✓ **Life with optional Trauma and TPD** | Non-Super Premium: \$26.08 Monthly

Benefit Payment Type: **Lump Sum** / Monthly Instalment | Purpose of Cover: **Personal only** / Buy/Sell / Key person / Loan protection

Life Benefit: \$1,000,000 | Premium Waiver Disability

Trauma Benefit: \$ | Trauma Definition:

TPD Benefit: \$ | TPD Definition:

Policy Summary

Remuneration: Commission

Commission Type: Uprfront (Hybrid)

Package Discount: None

Policy 1 Premium: **\$26.08** Monthly

[+ Add Policy / Life](#)

[Save Quote](#)

[Back to Quote List](#)

[PDF Quote](#)

[Start Application](#) >

- Create OneCare quotes & applications via Illustrator
- Pre-assess your clients using the online pre-assessment tool
- Apply a package discount with up to 10 lives (Family or Business)
- Multiple completion methods to choose from (Online, Tele-Interview & Client URL)
- Submit applications without requiring a client signature

Quote & Apply

Policy Alteration/Projection

Policy Alteration Quotes / Projections

+ New Policy Alteration Quote

Here you can create a new Policy Alteration Quote, and view all previously created Quotes. If you have submitted a quote as a Policy Alteration Request, you can track the status of it's submission here.

Search by Quote / Policy / Life Insured / Policy Owner

Created Date	Quote	Description	Status	Policy Number	Life Insured	Policy Owner	Premium	Expiry Date	Actions
11/02/2025	PQ-280225	CP off	Active	90424205	Affie Aebersold	Affie Aebersold	\$313.94	12/04/2025	Actions
10/02/2025	PQ-280221								
23/01/2025	PQ-280082								
05/11/2024	PQ-279775								
05/11/2024	PQ-279774								
05/11/2024	PQ-279772								
01/11/2024	PQ-279771								
31/10/2024	PQ-279770								
31/10/2024	PQ-279769								

New Policy Alteration Quote / Projection
Policy 77001640

Quote Expiry: 12/04/2025
Quote Date (for testers): 11 Feb 2025

77001640 - OneCare Non-super

Change Ownership

Payment Frequency: Monthly
State: ACT

Discounts: No records found

UIPTHILLUS C0940001373
Sex: Male
Date of Birth: 01/01/1970
Age: 54

Smoker Status: Non-Smoker

Add Cover

Life with optional Trauma and TPD

Life Cover

Cover Amount: 500,000
Value Protector option:
Premium: \$77.83 /mth

Premium Type: Variable Age-Stepped
Premium Waiver Disability option:
Benefit Payment Type:
Business Guarantee option:

- Generate alteration quotes on inforce Wealth Protection, OneCare, Active policies & more
- Quotes are valid for 60 days
- Submit decreases without a client signature from the new alteration quote screen.
- Reduce & increase sums, add covers, change waiting/benefit period, change occupation class & more
- Generate Change of Ownership quotes on eligible Wealth Protection & OneCare policies.

Quote & Apply

Change of Ownership

Policy Alteration Quote / Projection Close

Test New
Policy 77001645 - PQ-279772 View Quote PDF Start Application

Quote Expiry: 01/01/2025 Quote Date (for testers): 05/11/2024

Replacement Policy 1 - OneCare Non-super

Payment Frequency	State	Non-Super Payment Method
Monthly	ACT	Direct Debit

Discounts: No records found

UIPTHILLUS C0940001378 Sex: Male Date of Birth: 01/01/1970 Age: 54

Smoker Status: Non-Smoker Add Cover

1

2

3

- Three simple steps to complete a Change of Ownership application
- Once the quote has been created, select start application from the quote screen and follow the prompts on the three sections.
- Confirm or update contact details of the Life Insured
- Confirm new policy owner, be it either a person or a company
- Submit the application without requiring a signature

Change of Ownership Application Close

Test New
Policy 77001645 - PQ-279772 View Quote PDF Start Application

Life Insured Details Policy Administration

The life insured details below have been pre-filled for your convenience. If any details are incorrect tick the checkbox to continue.

Life Insured Details

Personal Details

Title	First Name	Middle Name	Last Name	Date of Birth
Mr	Uiphillus		C0940001378	01/01/1970

Residential Address

Address: 40 Gruzman View Suburb: TAYLOR

Contact Details

Email: abc@zurich.com.au Mobile: 04171

I confirm that the life insured details displayed are correct.

Change of Ownership Application Close

Test New
Policy 77001645 - PQ-279772 View Quote PDF Start Application

Please complete the required fields in each section and click on the Save button to save your changes.

Replacement Policy 1

Replacement Policy 1 - OneCare Non-super

Policy Owner Details

*You can add up to 2 owners to this policy.

Name	Relationship
+ Add owner	

Mailing Address

Nominate alternate address

Address: Please add at least 1 policy owner

Payment Details

Premium Frequency: Monthly + Add payment Details

Change of Ownership Application Close

Test New
Policy 77001645 - PQ-279772 View Quote PDF Start Application

Please review the details below. Note: you must download and review the Application Form PDF before you can submit the application.

Application Summary

Life Insured Details

Personal Details: Mr Uiphillus C0940001378, 1/01/1970, Male, Non-Smoker, aged 54
Residential Address: 40 Gruzman View, TAYLOR, ACT, 2913
Contact Details: abc@zurich.com.au, 0417147672 (M)

Policy Administration

Replacement Policy 1 - OneCare Non-super

Policy Owner	Uiphillus C0940001378
Mailing Address	40 Gruzman View, TAYLOR, ACT, 2913
Payment Details	Monthly, Direct Debit
Loyalty Program	Not eligible for Qantas Frequent Flyer
Nomination of Beneficiaries	Nomination of Beneficiaries Form required

Adviser Details

Applications

Applications

Apps in progress

Applications
Export Applications

Alert status	Latest adviser note	Life Insured	Date received	Days in progress	Status
No recent updates	No notes	Jonathon McJames	11/02/2025	1	Submitted
No recent updates	No notes	Jonathon McJames	11/02/2025	1	Submitted
No recent updates	No notes	uipath I000502717	11/02/2025	1	In Progress
No recent updates	No notes	uipathllius C0940002191	11/02/2025	1	In Progress
No recent updates	No notes	Jonathon Smith	11/02/2025	1	Submitted
No recent updates	No notes	Braxton Sponsler	10/02/2025	2	In Progress

An underwriting or admin requirement has been raised within the last 72 hours
✕

Application details: ReferenceFive PhaseOne
Export as PDF

✓

✓

In Progress

Finalised

Life insured	ReferenceFive PhaseOne	TFN status	Tax File Number Not Supplied
Date of birth	15/03/1991	Submission date	09/12/2024
Gender	Male		

Tele Interview Details

Status

●
Awaiting Booking

●
Awaiting Tele Interview

●
Tele Interview NPW

●
Tele Interview Complete

Date: 10/12/2024 12:30:PM (AEST)

Underwriting enquiries

1800 244 306

General enquiries

1800 500 655

adviser.service@zurich.com.au

Policy number	Product	Application type
90427466	Protection Plus	New Business

Requirements
Benefit details
Direct Message
Give Feedback for this page

Show outstanding requirements only

Notifications	Status	Date requested
<p>Declaration of Continued Good Health</p> <p>Due to the age of this application a declaration of continued good health may be required upon acceptance.</p>	Requested	08/02/2025

- View a list of applications in progress using the Applications tab
- Use the requirements section to view what is outstanding, with an option to upload files to “tick” it off the list
- View benefit details, and send direct messages to your case manager or underwriter
- Use the Tele-Interview booking tool to set up a specific time that suits your client best
- View contact information for the assigned Case Manager & Underwriter

My Clients



My Clients

Client details

Clients

Show filters

Until recently, we have not recorded beneficiaries details on our computer system. Beneficiaries on older policies, may not appear on this listing. If you have questions about any policy, please contact us on 1800 500 655.

Search

Client name	Title	Date of Birth	Gender	Address	Phone	Email
Aagaard, Ronny	Prof	11 Oct 1981	♂	2 WILLIAM ST HOBART TAS	0414497639	santosh.sharma@zurich.com.au
Abbo, Clevie	Prof	11 Jan 1987	♂	2 WILLIAM ST MELBOURNE VIC	0414497638	fake@hotmail.com
Abbott, Anthony	Mr	15 Apr 1976	♂	160 DANIELS Road MAGRA TAS	0466410623	
Abbott, Beverly	Mr	5 Oct 1970	♂	PO BOX 422 VICTOR HARBOR SA	0466410622	andrewprior2147@hotmail.com



Client: Mr Beverly Abbott ☆

Now you can generate stand alone projections for your client

I want to ...



Client Details		Address	
Date of birth	5/10/1970	Gender	Male
Email	andrewprior2147@hotmail.com	Mobile Country Code	Australia (+61)
Phone		Mobile	0466410622
Zurich LiveWell Member	No	Mailing Preference	<input type="radio"/> Post <input checked="" type="radio"/> Email

Policy	Role	Product	Superannuation	Status
76116124	LIFE INSURED, POLICY OWNER, PAYOR	Income Cover (Series 1)	No	IN FORCE

Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

- Get a list of every client within the “My Clients” tab
- View the client's contact information, including address, email, phone & preferred mailing preference
- Update the clients contact information (Phone, email, address etc) using the “I want to” option
- View a list of policies linked to this client, including their role (Life Insured, Policy Owner, Payor, Beneficiary)
- Status column allows you to quickly identifying which policies are inforce or lapsed





My Clients

Policy details

Policy Number 76116124 Now you can generate a Policy Alteration Quote I want to ...

Commencement date	15/12/2014	Product	Income Cover (Series 1)
Status	IN FORCE	Superannuation	No
Agent number	9999	Related superannuation policy	
LIF Flag	No	Related non-superannuation policy	
Reference No.	000093182764		Certificate of Currency
Policy eligible for Livewell	No		
Livewell Legacy Anniversary Tier			

Client role | Payor/Payment details | **Policy & benefit details** | Accounting history | Policy correspondence | Beneficiary details | More

Client role	Name	DOB	Phone	Mobile	Email
LIFE INSURE					

Customers' information While reasonable completeness of all policy terms & conditions

Premium \$97.18 **Payment Frequency** Monthly **Paid to Date** 17/02/2025

Commencement Date 01/12/2005

Life Insured Name	Date of Birth	Sex	Smoker Status	Indexation
KRISTIE ABBOTT	10/10/1980 (ANB 45)	Male	Smoker	Yes

Death Cover	Cover Amount	Premium
Death Cover	\$290,304	\$85.71

Death Cover Cover Amount \$290,304 Premium \$85.71

Cover Commencement Date 01/12/2005 (ANB 26) Original Cover Amount \$110,000

Cover Cessation Date 01/12/2079 (ANB 100) Premium Structure Variable Age-Stepped

Premium Waiver Business Future Cover option

- After selecting a policy, view a quick policy summary including commencement date and a Certificate of Currency
- Using the various tabs running across the middle of the screen to view policy information
- Use the “I want to” button to make requests such as adding QFF details & downloading a policy PDF
- Decline indexation for 12 months or permanently in the Policy & benefit details tab during renewal period
- View loading and exclusion information, premium type & additional options



My Clients

Cancel a policy

Policy Number 76116124 Now you can generate a Policy Alteration Quote I want to ...

Commencement date	15/12/2014	Product	Income Cover (Series 1)
Status	IN FORCE	Superannuation	No
Agent number	9999	Related superannuation policy	
LIF Flag	No	Related non-superannuation policy	
Reference No.	000093182764		Certificate of Currency
Policy eligible for Livewell	No		
Livewell Legacy Anniversary Tier			

Client role: Client role | Payor/Payment details | Policy & benefit details | Accounting history | Policy correspondence | Beneficiary details | More

Client role	Name	DOB	Phone	Mobile	Email
LIFE INSURED, POLICY OWNER, PAYOR	Beverly Abbott	05/10/1970		0466410622	andreprior2147@hotmail.com

Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

1 Cancel a policy using the “I want to” option

2 From the list, select Cancel the policy

3 Simply upload a signed letter from your client authorising the cancellation of the policy

4 Track the request via either the dedicated Service Request tab, or from the Service Request tab at a policy level

1

Self Service

I want to: Please select an option

- Cancel cover within policy
- Cancel the policy
- Create / view policy alteration quote or projection
- Edit payment details
- Export policy details as PDF
- Notify claim
- Other
- Provide Third Party Authority
- Request to decrease cover

2

Policy Cancellation

To apply to cancel the entire Policy, please complete a signed letter from the customer and submit below.

[Upload Files](#) Or drop files

Zurich doesn't support this file type or more than allowed files are being attached. Documents with '.pdf', '.png', '.jpg', '.jpeg', '.gif', '.tif', '.tiff', '.bmp' format can be attached. Maximum of 10 documents can be attached at a time.

[Cancel](#) [Submit](#)



My Clients

Update payment details

Policy Number 03351779 Now you can generate a Policy Alteration Quote I want to ...

Commencement date	01/12/2005	Product	Zurich Wealth Protection - Zurich Protection Plus
Status	IN FORCE	Superannuation	No
Agent number	LT93	Series	1
LIF Flag	No		Certificate of Currency
Policy eligible for Livewell	Yes		
Livewell Legacy Anniversary Tier			

Client role | **Payor/Payment details** | Policy & benefit details | Accounting history | Policy correspondence | Beneficiary details | More

Payor name	Kristie Abbott	Method of Payment	Credit Card
Payor address	52 Hunter Street, Rutherglen, VIC, 3685	Cardholder name	Mr & Mrs P Woodford
Billing frequency	Monthly	Card number	6646XXXXXXXX4849
Total premium*	\$97.18	Card type	Visa
Paid to date	17/02/2025	Expiry date	11/15

Edit payment

1 Edit Payment Details for Policy 03351779

Mr & Mrs P Woodford
6646XXXXXXXX4849
Credit Card
Charged Monthly

Warning
The next premium payment is due in the next 3 business days. The updated payment details may not be applied before this payment is drawn. To ensure the details are updated prior to the premium being drawn, please call 131 551.

Change Payment Details >

Change Payment Frequency >

Cancel Save

2 Payment Method

Please select the new Payment Method from the choices below.

Bank Account

Credit Card

< Back Next >

3 Payment Details Credit Card

Please provide Credit Card details below.

Name _____

Card number _____

CVV _____ Expiry date: MM / YY _____

How frequently should the payment method be charged for this policy?

Monthly

Changing the Payment Frequency will alter the Policy's Premium.

< Back Save >

- Instigate a payment details change using either the I want to option or via the payment details tab
- Select between Direct Debit, Credit Card or Rollover as preferred payment methods
- Once the request is submitted, track it until completion via the Service Requests tab
- Change payment frequency from the same screen
- Electronically accepted. No signature required



My Clients

Third Party Authority

- Submit Third-Party authorities on behalf of your clients
- Nominate one or multiple policies for the authority to be applied to
- Select between adding a spouse/family member, or alternatively, another adviser from the same office
- Choose whether the authority is ongoing, or for a nominated period
- Straight through processing, so once you hit submit, the authority will be active immediately





My Clients

Reinstate & Make a Payment



Policy Number 77578318 New Feature I want to ...

Commencement date	24/03/2020	Product	OneCare
Status	LAPSE	Superannuation	Yes
Agent number	7NMQ		
LIF Flag	Yes		
Reference No.	001007160902		

Policy has Lapsed
The policy can be reinstated without underwriting if payment of \$875.00 is made by the 25/10/2022. Reinstate now

Client role Payor

Client role
LIFE INSURED, PAYOR
Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

Policy Number 91086735 Now you can generate a P Report an Issue I want to ...

Commencement date	16/10/2020	Product	Zurich Wealth Protection - Zurich Protection Plus
Status	IN FORCE	Superannuation	Yes
Agent number	VU90	Series	3
LIF Flag	Yes		Certificate of Currency
LiveWell Policy	Yes		
Policy Anniversary Tier			

Anniversary Advice
This policy has entered its anniversary period. The figures below are effective from 16/10/2022. Make a Payment

Client role Payor/Payment details

Client role
LIFE INSURED, PAYOR
Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

Policy Number 77472671 Now you can generate a P Report an Issue I want to ...

Commencement date	03/11/2015	Product	OneCare Super
Status	IN FORCE	Superannuation	Yes
Agent number	7XDB		
LIF Flag	No		Certificate of Currency
Reference No.	001005441339		

Loyalty program name: Qantas Frequent Flyer

Member name	Member number	Date joined
Not provided	Not provided	Not provided

Approaching Cancellation Advice
This policy is approaching cancellation. To avoid cancellation, the payment of \$342.38 will need to be made before 26/09/2022. Make a Payment

Client role Payor/Payment details Policy & benefit details Accounting history Policy correspondence Beneficiary details More

Client role	Name	DOB	Phone	Mobile	Email
LIFE INSURED, PAYOR	Cassandra Casey	27/08/1974			debra79@example.org
BENEFICIARY	Sherry Casey	03/02/1977			debra79@example.org
BENEFICIARY	Omar Casey	21/04/2008			
BENEFICIARY	Scott Casey	10/11/2007			

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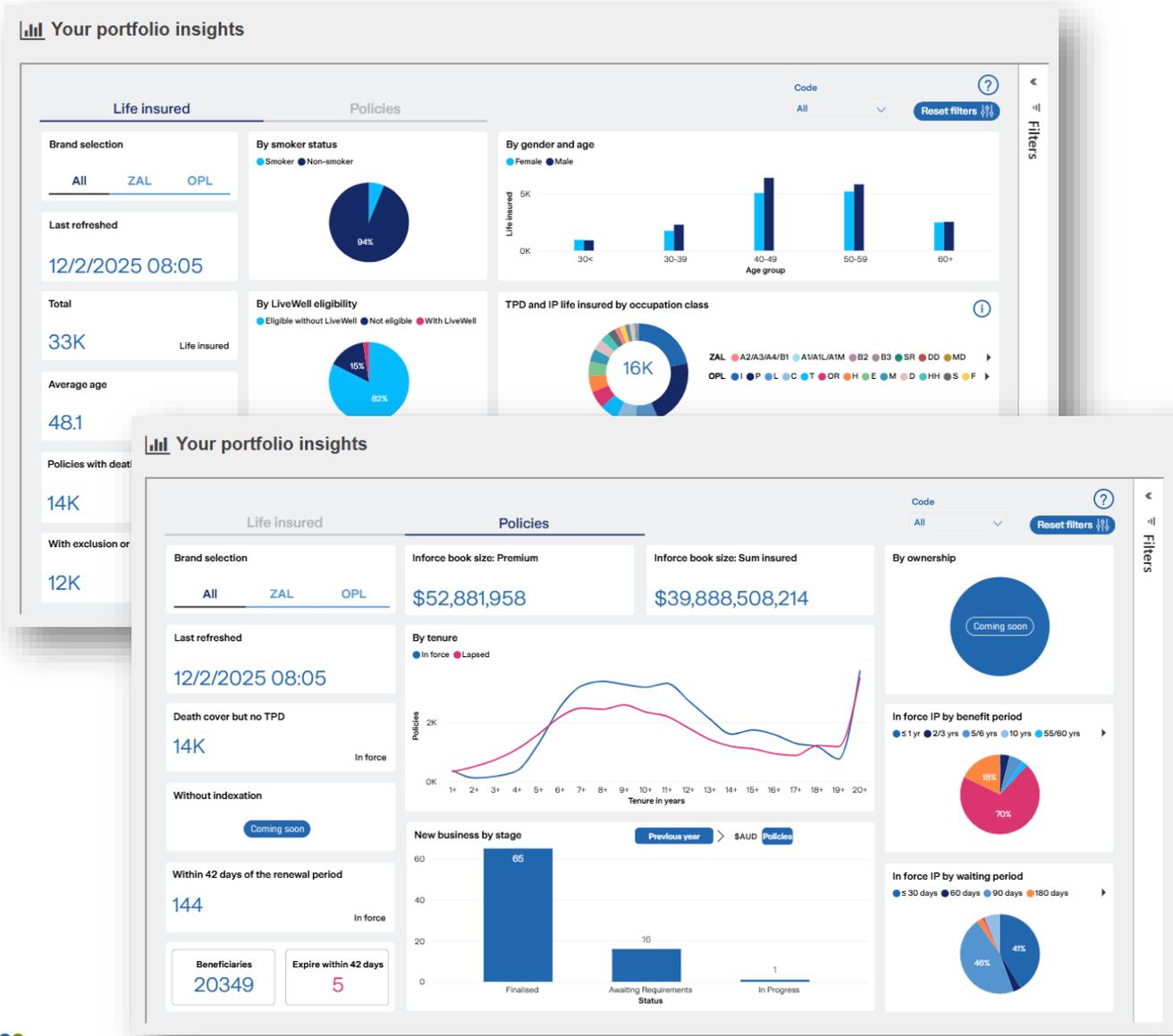
- Make one-off payments when policy is approaching cancellation, renewal or after lapsing
- Select Make a Payment or Reinstate Now
- Once selected, options will appear to enter in payment details to clear outstanding amounts
- Once submitted, an internal task will be created for the payment to be processed

Portfolio Insights



Portfolio Insights

Birdseye view of your book across Zurich & OnePath



- View a breakdown of your book across Zurich & OnePath
- Hover over each chart to “Drill through” to see the list of clients under each respective bits of data
- Options of two tabs (Life insured & Policies), with more to come in future iterations
- Client contact details are included in the drill through list, so you can easily contact your client if the need arises

Renewals

Renewal tracking

[Export](#)

To view specific renewal tracking notice types 'click above'

Notice type	Policy number	Life insured	Product name	Issue date	Lapse date	Details
Approaching cancellation advice	76124579	Autumn Bush	Life Insurance (Series 1)	14/7/2024	17/8/2024	
Approaching cancellation advice	03579136	Timothy Chung	Zurich Wealth Protection - Zurich Protection Plus	16/7/2024	19/8/2024	
Approaching cancellation advice	91227544	Cody Goodman	Zurich Wealth Protection - Zurich Protection Plus	17/7/2024	17/8/2024	
Approaching cancellation advice	03384717	Marissa Olsen	Special Risk Income Replacement - Special Risk Income Replacemnt	18/7/2024	21/8/2024	
Approaching cancellation advice	03579135	Danny Chung	Zurich Wealth Protection - Zurich Protection Plus	18/7/2024	21/8/2024	
Approaching cancellation advice	76124141	Dennis Shah	Life Insurance (Series 1)	18/7/2024	21/8/2024	
Approaching cancellation advice	03512737	Martin Foster	Zurich Wealth Protection - Zurich Protection Plus	21/7/2024	24/8/2024	
Approaching cancellation advice	76086072	Vicki Vaughn	Income Protection (Series 1)	21/7/2024	24/8/2024	
Approaching cancellation advice	76130354	Ricky Marsh	Life Insurance (Series 1)	21/7/2024	23/8/2024	
Approaching cancellation advice	76129880	Wayne Wagner	Life Insurance (Series 1)	23/7/2024	26/8/2024	

- View important renewal details in the Renewals tab
- Export the list to excel or CSV
- Search through the various notice types using the drop-down filter option
- View notice types in greater detail by expanding each line after selecting the details icon

Notice type	Policy number	Life insured	Product name	Issue date	Lapse date	Details
Approaching cancellation advice	76124579	Autumn Bush	Life Insurance (Series 1)	14/7/2024	17/8/2024	
Policy Owner		Bob Bush				
Amount due		\$521.95	Due date	24/7/2024		
Commencement date		24/12/2012	Total due	\$1,043.90		
Overdue amount		\$521.95	Premium frequency	Monthly		

Claims

Claims

Filter by Status: All Claims Search by Life insured / Policy owner / Policy No. I want to ...

Start typing to filter the list of claims.

Claim No. ⌵	Policy No. ⌵	Claim type ⌵	Life insured ⌵	Policy owner ⌵	Date lodged ⌵	Date finalised ⌵	Status ⌵
C-2024-305008	03384717	Income Protection	Marissa Olsen	Marissa Olsen			Notified
C-2024-305924	03507227	Total and Permanent Disability	Mallory Pacheco	Mallory Pacheco			Notified
C-2024-305813	03507226	Death	Mallory Pacheco	Thornton			Notified
C-2024-306858	76136857	Income Protection	Jack Santos	Jack Santos			Notified
C-2024-300973	91046489	Income Protection	Hector Huang	Hector Huang			Notified
C-2023-300498	83005315	Trauma	Ernest Ruiz	Ernest Ruiz			Notified
C-2024-306168	76084844	Income Protection	Donna Mathis	Donna Mathis			Notified
C-2024-307646	90423225	Total and Permanent Disability	Daisy Duck	Brighter Super Trustee			Notified
C-2024-307436	90423225	Total and Permanent Disability	CaseTwentyFive CaseTwentyFive	Brighter Super Trustee			Notified
C-2024-306824	76170887	Income Protection	Caleb Bolton	Caleb Bolton			Notified

Claim Number C-2024-305008

Claim status	Notified	Date of event	06/12/2011
Policy number	03384717	Date notified	27/05/2024
Claim type	Income Protection	Date lodged	
Life insured	Marissa Olsen	Date finalised	
Policy owner	Marissa Olsen		

Claim contact details [131 551](tel:131551) we.claims@zurich.com.au

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Claim Notification

Claim Details

Policy number	91022479	Product	Zurich Protection Plus
Adviser		Policy owner	Brighter Super Trustee
Life insured *	Select an Option	Claim type *	Select an Option
Date of event	<input type="text"/>		
Reason for claim *	<input type="text"/>		
Send forms to *	Select an Option		

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[Cancel](#) [Next >](#)

- View a list of all Zurich & OnePath claims.
- Notify us of a claim using the “I want to” option
- Select the claim number to view more information on that specific claim (Date submitted, payments etc)
- View the contact details for the claims assessor in the event you need to contact them
- After choosing to notify of a claim, simply provide as much information on the claim as possible, before nominating who the documents should be sent to.

Service Requests

Service requests + New service request

Open service requests 28

Ref. ↕	Subject ↕	Raised By ↕	Created ↕
SF4056156	37827432 - Increase quote - Smith, Jason	Adviser	10/02/2025
SF4054701	Test	Adviser	21/01/2025
SF4054595	Character limit test	Adviser	15/01/2025
SF4054594	Test	Adviser	15/01/2025
SF4026225	CPI Decline request for Edgar Mahoney	Adviser	20/11/2024
SF4017417	Rollover Request for policies 03579942	Adviser	05/11/2024
SF4017416	Policy Alte		
SF4016559	Direct Deb		
SF4016558	Policy Alte		
SF4014949	Rollover R		
SF4014946	Policy Alte		
TR-081776	Claim Noti		
SF4005896	Policy Alte		

New service request

Subject *

50 characters left Typed characters only

Comments *

Attachments

[Upload Files](#) Or drop files

Zurich doesn't support this file type or more than allowed files are being attached.

Documents with '.pdf', '.png', '.jpg', '.jpeg', '.gif', '.tif', '.tiff', '.bmp' format can be attached. Maximum of 10 documents can be attached at a time.

[Submit](#)

- Track open and closed Service Request
- Selecting the reference number hyperlink allows you to see any comments or updates from those managing the request
- Submit new Service Request
- Once closed, Service Requests appear in the system for two years, helping to keep a trail of what's been requested.

Tools & Resources

ZURICH OnePath

Home Quotes Applications My clients Renewals Claims Service Requests Insights Tools & Resources

New Policy Quotes

Reference number	Life insured	Date of birth	Date last updated	
1192648635	John Smith	6/11/1987	31/1/2025	
1059131587	Andrew Prior	6/1/1987	31/1/2025	Quote
1897945757	Fake Name	6/11/1987	31/1/2025	Quote
1462685557	Fake Fake	1/8/1989	31/1/2025	Quote
Q002885956	Donna Test	1/1/1990	21/1/2025	Unsubmitted application

View more quotes >

Applications

Life insured	Date received	Status
uipath 1000502732	13/02/2025	In Progress
uipathillus C0940002201	13/02/2025	In Progress
Jonathon Rollovertestenoone	12/02/2025	In Progress
Benefit Teleintprocess	12/02/2025	Awaiting Requirements
uipath 1000502725	12/02/2025	In Progress

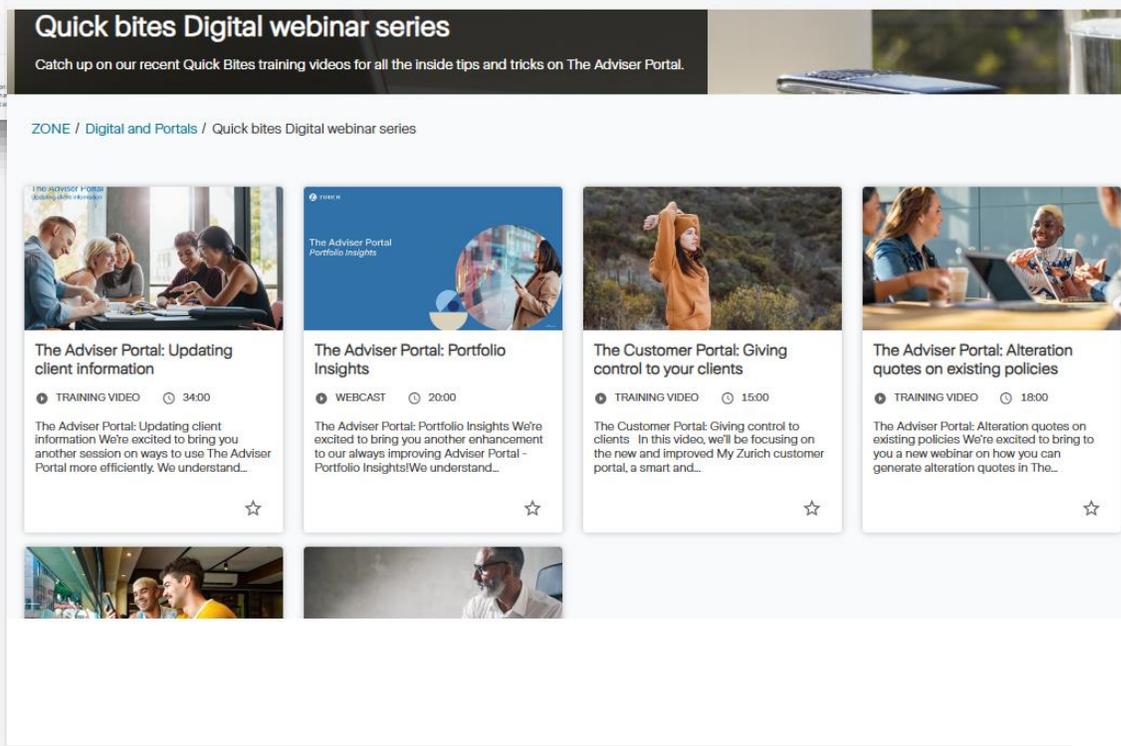
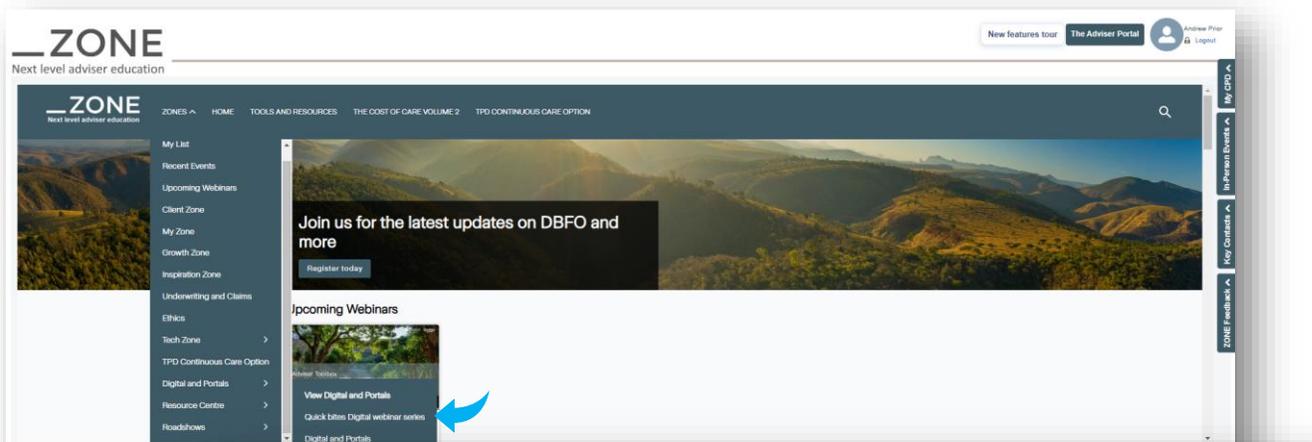
View more applications >

Claims

Tools & Resources

- _Zone
- Zurich Adviser Guide
- OneCare Adviser Guide
- PDS & Forms
- Data feed access
- Reports
- FAQs

- Access _Zone, Zurich's adviser education platform
- Launch Zurich & OnePath's Digital Adviser Guide
- View various PDS & Forms for both Zurich & OnePath
- Set up Data feed access to your client management systems
- Generate various reports on your book of clients
- View FAQ's



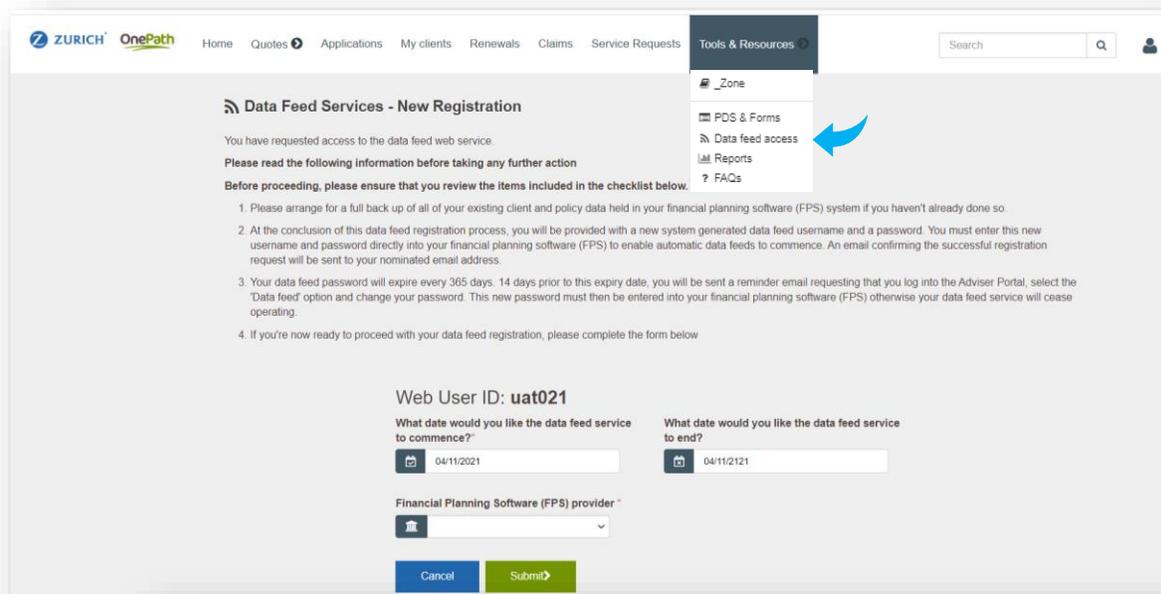
- View On-Demand content using Zurich's _Zone Education platform
- Access various topics including Client Zone, Growth Zone, Digital & Portals and more
- Obtain CPD points on eligible sessions
- Access White Label marketing material, Insurable Income calculator & Cost of Care tool
- Single sign on. Your portal password works for _Zone



Zurich PDS and Forms	OnePath PDS and Forms
 Investment funds alterations forms	>
 Investment funds PDS and application forms	>
 Life Risk PDS	>
 Life Risk Policy alterations forms	>
 Life Risk Underwriting forms	>
 Retirement alteration forms	>
 Retirement PDS and application forms	>
 Superannuation PDS and application forms	>

Superann	Zurich PDS and Forms	OnePath PDS and Forms
	 Administration	>
	 Adviser	>
	 Application Forms	>
	 Fact Sheets	>
	 OneCare Express	>
	 Products & Marketing	>
	 Underwriting - Financial	>
	 Underwriting - General	>
	 Underwriting - Medical	>
	 Underwriting - Pastimes	>

-  Obtain forms for both Zurich & OnePath
-  Download the respective PDS' for all products
-  Access investments form
-  Download application forms



Data Feed Services - New Registration

You have requested access to the data feed web service.

Please read the following information before taking any further action

Before proceeding, please ensure that you review the items included in the checklist below.

1. Please arrange for a full back up of all of your existing client and policy data held in your financial planning software (FPS) system if you haven't already done so.
2. At the conclusion of this data feed registration process, you will be provided with a new system generated data feed username and a password. You must enter this new username and password directly into your financial planning software (FPS) to enable automatic data feeds to commence. An email confirming the successful registration request will be sent to your nominated email address.
3. Your data feed password will expire every 365 days. 14 days prior to this expiry date, you will be sent a reminder email requesting that you log into the Adviser Portal, select the 'Data feed' option and change your password. This new password must then be entered into your financial planning software (FPS) otherwise your data feed service will cease operating.
4. If you're now ready to proceed with your data feed registration, please complete the form below

Web User ID: **uat021**

What date would you like the data feed service to commence?*

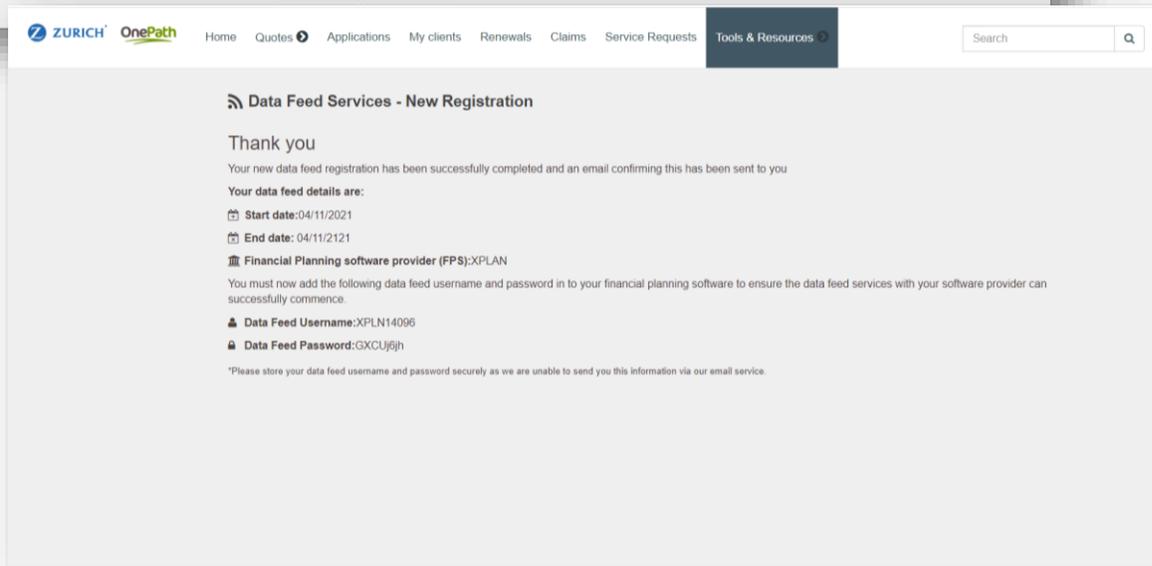
04/11/2021

What date would you like the data feed service to end?*

04/11/2121

Financial Planning Software (FPS) provider*

Cancel Submit



Data Feed Services - New Registration

Thank you

Your new data feed registration has been successfully completed and an email confirming this has been sent to you

Your data feed details are:

Start date: 04/11/2021

End date: 04/11/2121

Financial Planning software provider (FPS): XPLAN

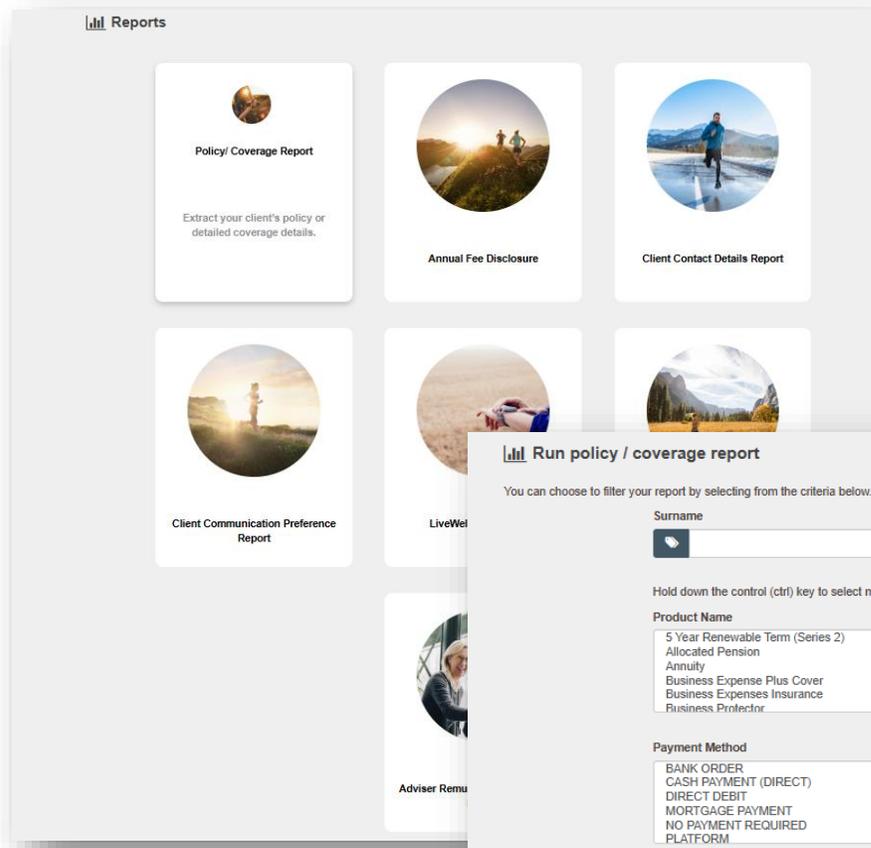
You must now add the following data feed username and password in to your financial planning software to ensure the data feed services with your software provider can successfully commence.

Data Feed Username: XPLN14096

Data Feed Password: GXCUj6jh

*Please store your data feed username and password securely as we are unable to send you this information via our email service.

- Set up Data feeds into your client management system
- Data feeds can be set up using XPLAN, Adviser Logic, Platform Plus & Adviser Intelligence
- Once you have set up in the portal, you will need to enter your Data feed username and password into your respective system
- Once submitted, you will receive confirmation the feed has been set up successfully
- To cancel, simply go back to the data feed section and select cancel



Run policy / coverage report

You can choose to filter your report by selecting from the criteria below. The report will be downloaded as a CSV file.

Surname

Hold down the control (ctrl) key to select multiple options

Product Name

- 5 Year Renewable Term (Series 2)
- Allocated Pension
- Annuity
- Business Expense Plus Cover
- Business Expenses Insurance
- Business Protector

Payment Method

- BANK ORDER
- CASH PAYMENT (DIRECT)
- DIRECT DEBIT
- MORTGAGE PAYMENT
- NO PAYMENT REQUIRED
- PLATFORM

Payment Frequency

- FORTNIGHTLY
- HALF YEARLY
- MONTHLY
- PREMIUMS FULLY PAID
- ONCE ONLY (SINGLE PREMIUM)
- SINGLE

Commencement Date: (dd/mm/yyyy)

Range From Range To

Fund Balance:

Range From Range To

Date of Birth: (dd/mm/yyyy)

Range From Range To

[Export Policy Report](#) [Export Coverage Report](#)

- Generate reports across your entire book of clients
- Download the reports into your preferred format
- Policy/Coverage Report, Client Communication Report, Overdue Payment Report & more
- Understand which of your clients is engaging with our LiveWell program by using the LiveWell report
- Adviser Remuneration Transaction report gives you a complete breakdown of commissions that have been paid to you

Multi Factor Authentication

MFA



Multi Factor Authentication

Extra layer of security, protecting yours and your client's data

ZURICH OnePath

Log in to the Adviser Portal
Enter your credentials below

[Log In](#)
[Forgot your password?](#)

Don't have an account? Register below

[Register](#)

Having problems?
1800 500 655

Zurich Privacy | Security | Terms and Conditions | Self Service Terms of Use | © Copyright 2025 ZFSAL

ZURICH OnePath

Verify Your Identity

You're trying to **log in to Adviser Portal**. To make sure your Adviser Portal account is secure, we have to verify your identity.

Enter the verification code we texted to +** *****0623.

Verification Code

[Verify](#)

[Resend Code](#)

- Log on using your login credentials
- On first login, you will be prompted to select between receiving a code via SMS or email.
- Codes are sent to your mobile if SMS is selected, whilst for email, the code is sent to the email in your "Email" field
- Update your preference between SMS/Email by going to preferences and selecting the "Security Preferences" tab.

Preferences

[My details](#) | **[Security Preferences](#)** | [Delegate my access](#) | [Access delegated to me](#) | [Notification preferences](#)

Change Password

Old Password ✘ at least 8 characters long

New Password ✘ at least one number

Verify New Password ✘ at least one uppercase letter

✘ at least one lowercase letter

✘ confirm passwords match

[Change Password >](#)

Change Multi Factor Authentication (MFA) Preference

Select whether you want to receive your MFA security verification code by SMS or Email.

MFA Security Preference

[Change MFA Preference >](#)



Thank you