# BT Life: Adviser Maintenance

How to make adviser maintenance requests using TAC and downloadable forms.

# TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

# **Update Contact Details**

To notify TAL Adviser Services of any changes to your contact details:

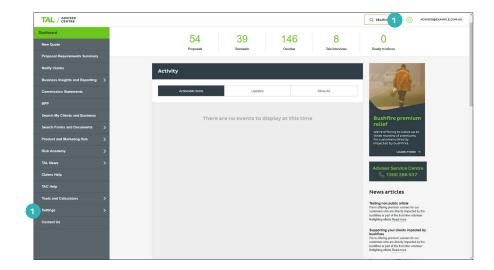
 Select the cog icon next to your username, followed by Account Settings

OR

Select **Settings** from the lefthand navigation panel.

#### 2 Select Update My Adviser

Account Details from the Settings menu.



TAL / ADVISER	Q SEARCH () ADVISERIJEXAMPLE.COM.AU
< Dashboard	Dashboard   Settings
Settings	Settings
My TAC Account	
Change Password	
Update My Adviser Account Details	My TAC Account Click here to add, edit or remove account access to your account →
Data Feed	
Product Settings	Update My Adviser Account Details This allows you to notify TAL Adviser Services of any contact detail changes → 2
	Data Feed Link your 7A, business to your own customer distabases →
	Product Settings Customes your settings for new quotes and applications, including policy type, premium thequency and your tele-interview preference →
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- Use the text fields to complete or update your contact details as appropriate.
- Select Update. A notification of your request will be sent to TAL's Adviser Administration team.

Your Contact Details	
Please Complete your contact details below should we need to contact you regarding the details	
Name:	Update details for:
	73025 - 🤇
Contact Number:	
Email Address:	
Update Details	Business Address
Opciate Details	DUSHIDSS AUXIDESS
Business Phone No:	Address Line 1:
Home Phone No:	Address Line 2:
Fax No:	Suburb:
Mobile No:	State:
	Please Select 🗸
Email Address:	Postcode:
	Country:
	Australia

# **Change Password**



2 Enter your existing password and create a new one.

Passwords must be at least eight characters in length and include at least one lower-case letter, one upper-case letter, one special character, and one numeral.

3 Select Update to save. Confirmation of the password change will be sent to your inbox.

Dashboard	Dashboard   Settings
lettings	Settings
My TAC Account	5
Change Password	
Update My Adviser Account Details	MyTACAccount
Data Feed	Click here to add, edit or remove account access to your account ->
Product Settlings	Update My AdViser Account Details This allows you to notly TAL Adviser Services of any contact detail changes ->
	Data Feed Link your IPAL business to your own customer databases →
	Product Settings Customice your settings for new quotes and applications, including policy type, premium frequency and your tele-interview preference. →
	Alasa Autor Autoria Alasa Alasa Alasa
Dashboard   Settings   My TAC Ac	
	ccevint   Charge Password
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Change Pa	ccevint   Charge Password

# See the headings below for more instructions on adviser maintenance requests.

Note: For more information on how to download forms from TAC, see Searching TAC quick reference guide.

# **Dealer and Adviser Registration**

To register a dealer or adviser:

- Download the **Australian Financial Services Licensee Application** form from TAC.
- Email the completed form to adviser.admin@tal.com.au

## **Dealer and Adviser Termination**

To terminate a dealer or adviser:

• Email details of the termination request to <u>adviser.admin@tal.com.au</u>

# Individual Reallocations

For individual reallocations to a new adviser:

Email completed **Client Transfer to a New Adviser** form to <u>btlifecommissions@tal.com.au</u>

For individual reallocations to an adviser within the same dealer group:

 Email completed Transferring a Client to New Adviser within Dealer Group form to <u>btlifecommissions@tal.com.au</u>

## **Bulk Reallocations**

For bulk reallocations to a new adviser code (same dealer group and practice)

• Email details of the request to <u>btlifecommissions@tal.com.au</u>

For bulk reallocations to a new dealer group:

• Email details of the request to <u>btlifecommissions@tal.com.au</u>

#### Commissions

For commission frequency changes:

- Download the Life Insurance Frequency Change Request form from TAC.
- Email the completed form to <u>btlifecommissions@tal.com.au</u>

To cease or resume commission payments:

 Email completed Commission Opt In / Opt Out form to either <u>btlifenewbusiness@tal.com.au</u> or <u>btlifecommissions@tal.com.au</u>

For more information, please contact us on the details below: **TAL** and **Asteron** – **1300 286 937** (Monday to Friday 8am – 7pm AEST) <u>BT Life – 1300</u> **553 764** (Monday to Friday 8am – 6:30pm AEST)

#### adviser.tal.com.au

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TAL

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