

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

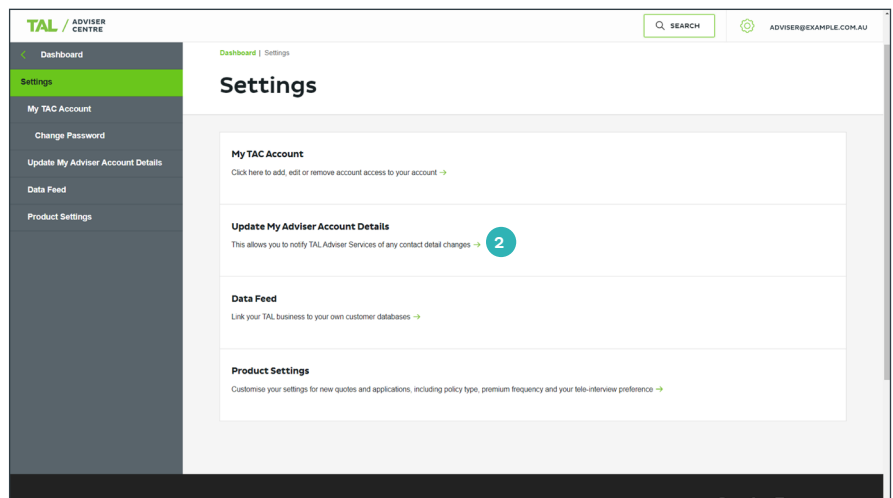
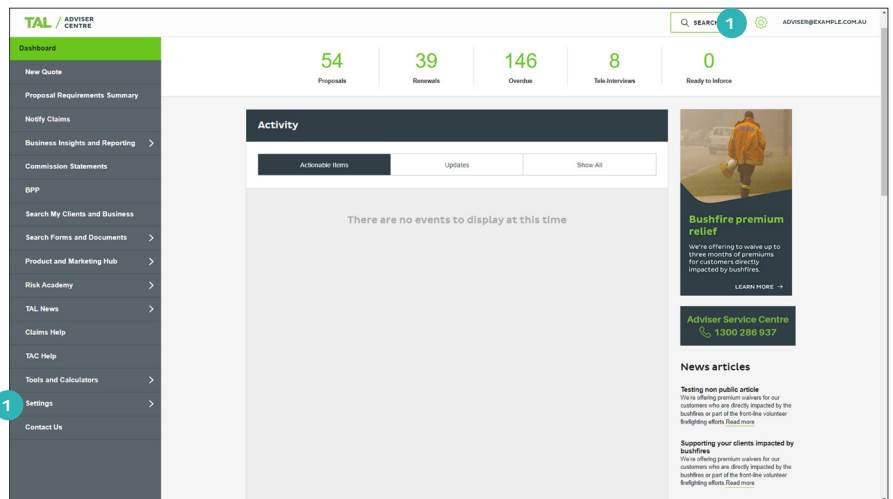
To notify TAL Adviser Services of any changes to your contact details:

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

OR

Select **Settings** from the left-hand navigation panel.

- 2 Select **Update My Adviser Account Details** from the Settings menu.



3 Use the text fields to complete or update your contact details as appropriate.

4 Select **Update**. A notification of your request will be sent to TAL's Adviser Administration team.

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Change Password

1 From the Settings page, select **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.

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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 adviser.admin@tal.com.au

Individual Reallocations

For individual reallocations to a new adviser:

- Email completed **Client Transfer to a New Adviser** form to btlifecommissions@tal.com.au

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

- Email completed **Transferring a Client to New Adviser within Dealer Group** form to btlifecommissions@tal.com.au

Bulk Reallocations

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

- Email details of the request to btlifecommissions@tal.com.au

For bulk reallocations to a new dealer group:

- Email details of the request to btlifecommissions@tal.com.au

Commissions

For commission frequency changes:

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

To cease or resume commission payments:

- Email completed **Commission Opt In / Opt Out** form to either btlifefewbusiness@tal.com.au or btlifecommissions@tal.com.au

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

adviser.tal.com.au

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