

BT Life: Quotes

Using TAC to request an existing business quote.

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

Existing Business Quotes: In-Force

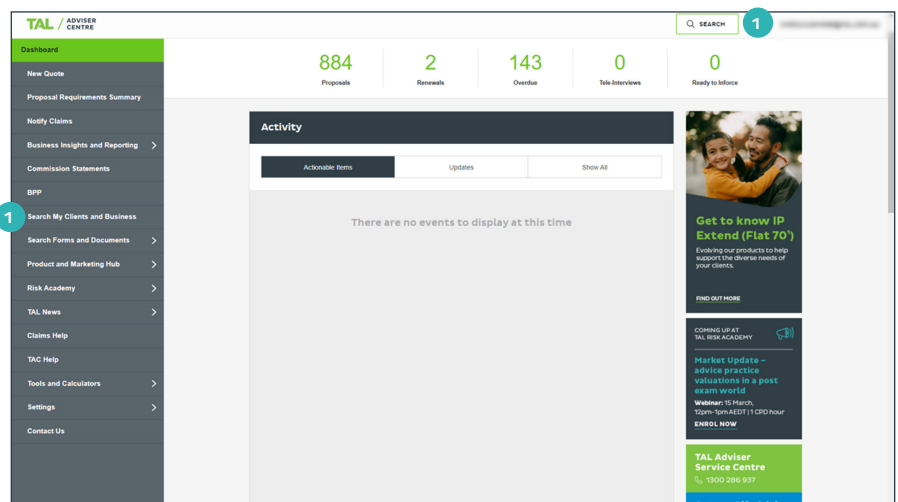
To request a quote for an in-force policy:

1 Navigate to a client record using the **Search function** at the top of the page.

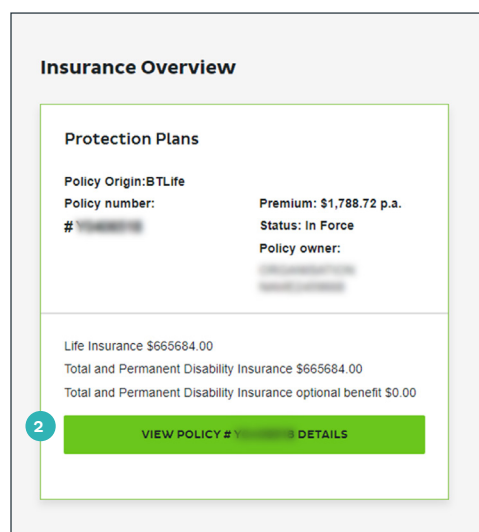
OR

Select **Search My Clients and Business** from the left-hand panel.

See **Searching TAC** QRG for more information.



2 From the client record, select **View Policy Details**.



3 Select **Request Existing Business Quote**.

4 Complete the online form with details of the in-force quote request, including:

- A Sum Insured / Benefit Amount Increase
- B Sum Insured / Benefit Amount Decrease
- C Waiting Period Change
- D Benefit Period Change
- E Decline CPI
- F Cancellation of Benefit
- G Change Frequency

5 Use the **Additional Notes** field to include any other comments or instructions.

Please note: Do not include any Banking, Credit Card, or TFN details.

6 Select **Send** to submit your request.

Please allow up to 3 business days for processing.

Protection Plans | 113940518

Policy Origin	TLIS	Payment Details
Policy Status	In Force	Policy Exclusion and Loadings
Policy Owner Name		View Correspondence
Policy Commencement Date	06/12/2013	Search Administration Forms
Payment Frequency	Monthly	Request Existing Business Quote 3
Instalment Premium	\$149.06	View Certificate of Currency
Annual Premium	\$1,788.72	
Policy Fee	\$111.96	
Next Bill Date		
Paid To Date		
Policy Owner Address		
Policy Owner Telephone		
Adviser Name		
Adviser Number		

Request Existing Business Quote | 113940518

INFORCE QUOTES
The below web form can be used to request an **Inforce quote**, and is used for general policy alterations only.

REPLACEMENT QUOTES
For a policy replacement or transfer (including a change of ownership or transferring on or off platform), you will need a **Replacement quote**. To obtain a replacement quote, please download a copy of the **BT Manual Quote Form**, complete and return to us at BTlifequotes@tai.com.au.
Please note: This form must be downloaded to your device, edited and saved in Adobe Acrobat.
For more information, please refer to the BT Protection Plans Adviser Guide or Quick Reference Guide - BT Life: Quotes.

Quotes Available for Request

Sum Insured / Benefit Amount Increase	A Provide details of the benefits and from and to values
Sum Insured / Benefit Amount Decrease	B Provide details of the benefits and from and to values
Waiting Period Change	C Provide details of the benefits and from and to values
Benefit Period Change	D Provide details of the benefits and from and to values
Decline CPI	E Provide details of the benefits
Cancellation of Benefit	F Provide details of the benefits
Change Frequency	G Provide details

Add any other alteration details below:

NOTE: Do not include any Banking, Credit Card or TFN details.

5 **NOTE:** Do not include any Banking, Credit Card or TFN details.

Please allow 2-3 business days to action email requests.

Reset **SEND** 6

Existing Business Quotes: Cancel & Replace

To create a cancel & replace quote for an in-force policy:

- 1 From the client record, select **View Policy Details**.
- 2 Select **Request Existing Business Quote**.
- 3 Download the **BT Manual Quote Form** by selecting the link at the top of the page.

Note:

If the PDF **does not** download automatically, proceed to step 4.

Otherwise, proceed to step 5.

Insurance Overview

Protection Plans

Policy Origin: BTLife
 Policy number: # [REDACTED] Premium: \$1,788.72 p.a.
 Status: In Force
 Policy owner: [REDACTED]

Life Insurance \$665684.00
 Total and Permanent Disability Insurance \$665684.00
 Total and Permanent Disability Insurance optional benefit \$0.00

1 VIEW POLICY # [REDACTED] DETAILS

Protection Plans | [REDACTED]

Policy Origin: TLIS	In Force	Payment Details
Policy Status: In Force		Policy Exclusion and Loadings
Policy Owner Name: [REDACTED]		View Correspondence
Policy Commencement Date: 06/12/2013		Search Administration Forms
Payment Frequency: Monthly		Request Existing Business Quote 2
Instalment Premium: \$149.06		View Certificate of Currency
Annual Premium: \$1,788.72		
Policy Fee: \$111.96		
Next Bill Date:		
Paid To Date:		
Policy Owner Address:		
Policy Owner Telephone:		
Adviser Name:		
Adviser Number:		

Request Existing Business Quote [REDACTED]

INFORCE QUOTES
 The below web form can be used to request an Inforce quote, and is used for general policy alterations only.

REPLACEMENT QUOTES 3
 For a policy replacement or transfer (including change of ownership or transferring on or off platform), you will need a Replacement quote. To obtain a replacement quote, please download a copy of the [BT Manual Quote Form](#), complete and return to us at BTLifequotes@tal.com.au.

Please note: This form must be downloaded to your device, edited and saved in Adobe Acrobat.

For more information, please refer to the BT Protection Plans Adviser Guide or Quick Reference Guide - BT Life: Quotes.

Quotes Available for Request

Sum Insured / Benefit Amount Increase	Provide details of the benefits and from and to values
Sum Insured / Benefit Amount Decrease	Provide details of the benefits and from and to values
Waiting Period Change	Provide details of the benefits and from and to values
Benefit Period Change	Provide details of the benefits and from and to values
Decline CPI	Provide details of the benefits
Cancellation of Benefit	Provide details of the benefits
Change Frequency	Provide details

Add any other alteration details below:

NOTE: Do not include any Banking, Credit Card or TFN details

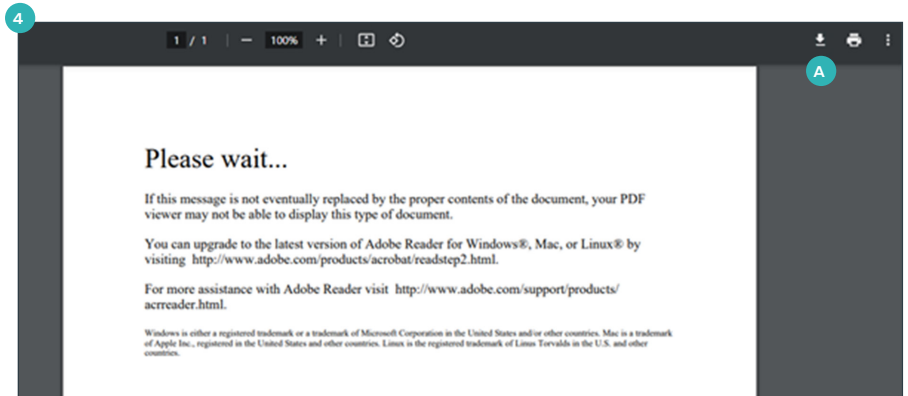
NOTE: Do not include any Banking, Credit Card or TFN details.

Please allow 2-3 business days to action email requests.

Reset
SEND

4 If the PDF **does not** download automatically and you encounter this error message:

A Select the **Download** icon in the top-right hand corner to save a version to your device.



5 Complete the form, detailing your adviser details, policy information, and proposed benefit information, and then save the form to your local drive.

6 Email the completed form to **btlifequotes@tal.com.au**.

Please allow up to 3 business days for processing.

6

To: btlifequotes@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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TAL Life Limited | ABN 70 050 109 450 | AFSL 237 848

TAL Life Insurance Services Limited | ABN 31 003 149 157 | AFSL 233 728

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