

Certificate of Currency

How to generate and download a certificate of currency in TAC.

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

Policy Record

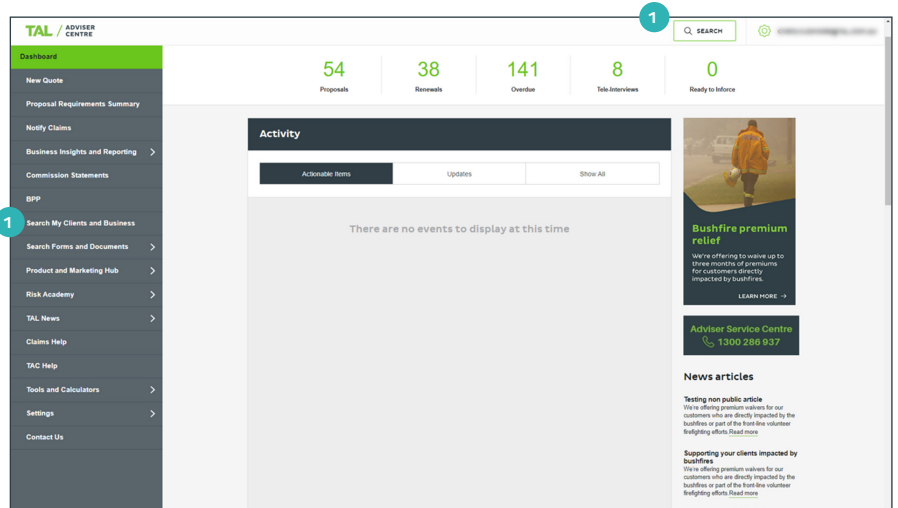
A certificate of currency can be generated from a client's **Policy Record**.

To navigate to a Policy Record:

- 1 Select **Search** from the TAC home dashboard.

OR

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



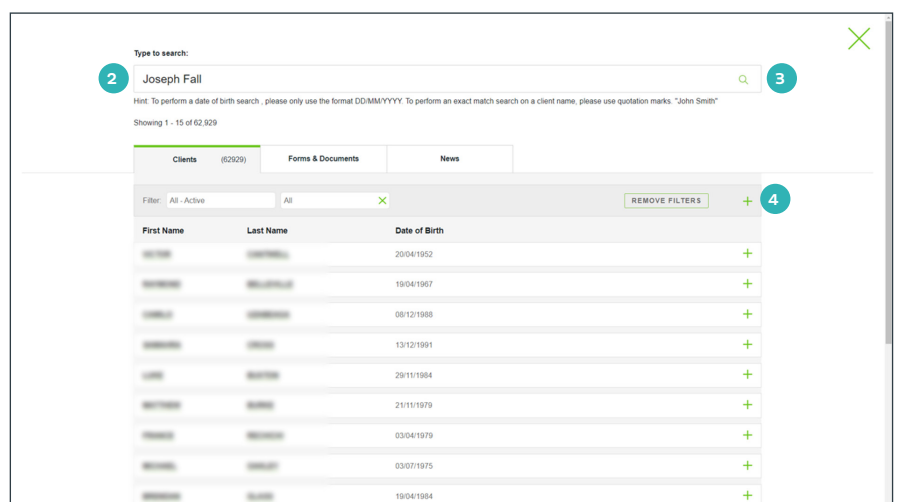
- 2 Enter your search criteria in the search box at the top of the page.

Client records can be searched by:

- Name
- Date of birth
- Quote reference
- Policy number

- 3 Select the **magnifying glass** icon or press return to generate search results.

- 4 **Optional:** Select the **plus (+)** icon to apply filters to the search results, unless searching by policy number.



5 Identify a client record from the search results.

Select the **plus (+)** icon to the right-hand side of their name to expand the record overview.

6 From the expanded overview of the client record, select **View Policy** to open a policy in a new window.

See **6 A.**

OR

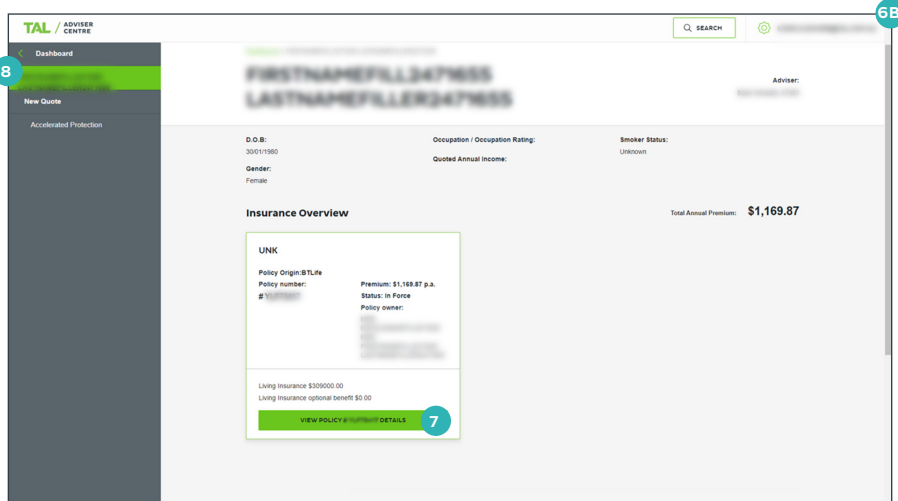
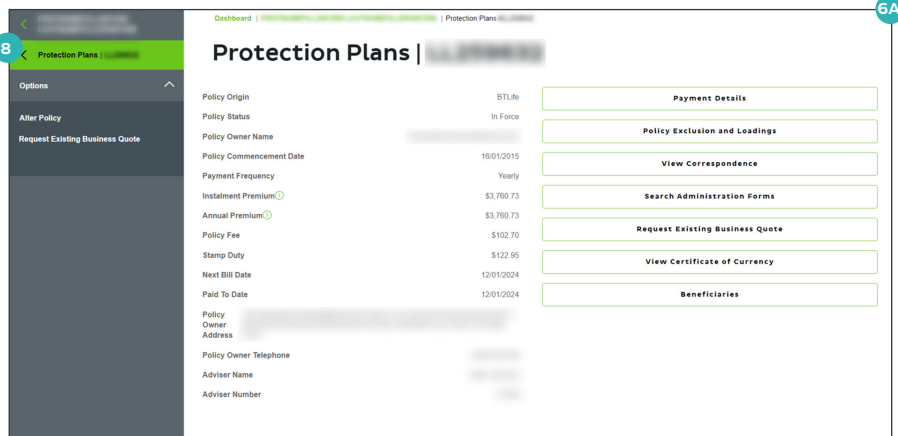
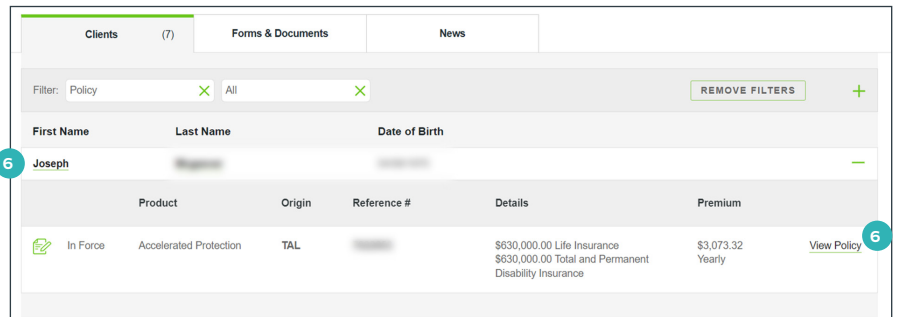
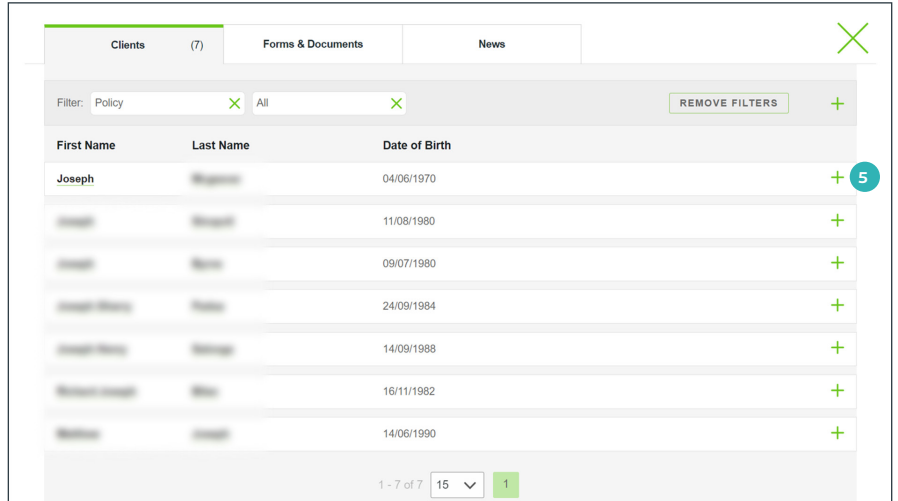
Select the client's **first name** or **last name** to open their record in a new window.

See **6 B.**

7 Under the Insurance Overview heading, select **View Policy Details** to open the policy record in a new window.

See **6 A.**

8 Return to the previous screen using the breadcrumbs menu in the left-hand navigation panel.



View and print

To view and print a certificate of currency from a Policy Record:

- 1 Select **View Certificate of Currency** from the list of options on the right-hand side of the Policy Record.
- 2 The certificate of currency will open in a new browser window as per image.
- 3 To print, select the **printer** icon in the top-right corner.

The screenshot shows a web interface for 'Protection Plans'. On the left is a sidebar with 'Options' expanded, listing 'Alter Policy' and 'Request Existing Business Quote'. The main area displays policy details for 'BTLife' in 'In Force' status, including dates, premiums, and fees. On the right, a vertical menu contains several options: 'Payment Details', 'Policy Exclusion and Loadings', 'View Correspondence', 'Search Administration Forms', 'Request Existing Business Quote', 'View Certificate of Currency' (highlighted with a red circle and the number 1), and 'Beneficiaries'.

The screenshot shows a 'Certificate of Currency' document for TAL Life Limited. It includes the company logo and name, and a 'Print' icon in the top right corner (highlighted with a red circle and the number 3). The document is divided into sections: 'Policy Details', 'Benefit Details', and a 'SUMMARY FOR JOSEPH M. [REDACTED]'. The summary table is as follows:

Life Insurance Plan	
Sum Insured/Monthly Benefit	\$630000
Instalment Premium	\$96.48
Annual Premium	\$1157.76
Annual Stamp Duty	\$17.16
Annual Policy Fee	\$100.8
Premium Type	Stepped
CPI	Y
Start Date	03/11/2021
Expiry Date	03/11/2069

TPD Insurance (Attached)	
Definition:Own Occupation	
Sum Insured/Monthly Benefit	\$630000
Instalment Premium	\$159.63
Annual Premium	\$1915.56
Annual Stamp Duty	\$189.84
Annual Policy Fee	\$0
Premium Type	Stepped
CPI	Y
Start Date	03/11/2021
Expiry Date	03/11/2034

Below the table, there is a disclaimer: 'Your policy may have other options connected to your benefits which are not listed in this document. For full details, please refer to your most recent policy schedule. This document confirms that the above policy is current and paid until 03/01/2023, subject to all payments being cleared by your financial institution. If you have any questions please call the Customer Service Centre on 1300 209 088, Monday to Friday, 8am - 7pm (AEST). Alternately, you can email customerservice@tal.com.au quoting Policy Number: [REDACTED]'.

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

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