Commission Statements

How to access and download commission statements in TAC.

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

Commission Statements

To download a commission statement from TAC:

- 1 Select **Commission Statements** from the left-hand panel of the TAC home dashboard.
- 2 Use the **Origin** drop-down menu to show statements for only TAL, BT Life, or Asteron.

Please note: Adviser statements are only available for TAL and BT Life, **not** Asteron.

3 Complete the **Agreement Number** field to filter statements relating to a specific number.

4 Use the **From Date** and **To Date** fields to show statements within a specific date range.



Dashboard	Commission Statemen	ts							
Con	nmissi	on	Stateme	nts					
Comm	ission Statements	2		3					
Origin	All	~	Agreement Number		From Date	dd/mm/yyyy	To Date	dd/mm/yyyy	SUBMIT
Please note	that the distributor le	evel state	ments are only available for	TAL and BTLife, no	t Asteron.				
To access y	our Commission St	atements	you can download the mos	t recent commissi	on statement o	r use the menu t	elow to acc	ess historical data.	
2023 TAL	Commission Dates								

Dashboard Commission Statements	
Commissio	n Statements
Commission Statements	
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Please note that the distributor leve	al statements are only available for TAL and BTLIfe, not Asteron.
To access your Commission State	ments you can download the most recent commission statement or use the menu below to access historical data.
2023 TAL Commission Dates	



5 Select Submit to apply filters.

6 To download a commission statement in CSV format:

Select Download Excel.

See **6 A.**

OR

7 To download a commission statement in PDF format:

Select Download PDF.

See7A.

oard | Commission Statement **Commission Statements** Commission Statements All ✓ Agreement Number From Date dd/mm/yyyy To Date dd/mm/yyyy Origin SUBMIT 5 Please note that the distributor level statements are only available for TAL and BTLife, not Asteron. To access your Commission Statements you can download the most recent commission statement or use the menu below to access historical data. 2023 TAL Commission Dates Run Date Origin Agreement Number DOWNLOAD EXCEL DOWNLOAD PDF 13 Jul, 2023 BTLife 101371 BTLife DOWNLOAD EXCEL DOWNLOAD PDF 13 Jul, 2023 101461 13 Jul, 2023 BTLife DOWNLOAD PDF 75989 DOWNLOAD EXCEL 13 Jul, 2023 101520 BTLife DOWNLOAD EXCEL DOWNLOAD PDF

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	1817292/2	Example	Refunded Premium	RTPD52.11	Life Insurance Plan (TPD) - Hybrid		0 0	-2849.36	100	ADJ	Y	(8)	1234	5 Example		
	1817293/1	Example	Refunded Premium	RTRA61.11	Critical Illness Plan - Hybrid		0 0	-1955.76	100	ADJ	Y	(R)	1234	5 Example		
	1817293/2	Example	Refunded Premium	RTPD52.11	Life Insurance Plan (TPD) - Hybrid		0 0	-1638.4	100	ADJ	Y	(R)	1234	5 Example		
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	1817293/1	Example	Refunded Premium	RTRA61.11	Critical Illness Plan - Hybrid		0 0	-1955.76	100	ADJ	Y	(R)	1234	5 Example		
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	1817293/1	Example	Refunded Premium	RTRA61.11	Critical Illness Plan - Hybrid		0 0	-1955.76	100	ADJ	Y	(R)	1234	5 Example		
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	1817292/1	Example	Refunded Premium	RDTH49.11	Life Insurance Plan - Hybrid		0 0	-2202.08	100	ADJ	Y	(8)	1234	5 Example		
	1817292/2	Example	Refunded Premium	RTP052.11	Life Insurance Plan (TPD) - Hybrid		0 0	-2849.36	100	401	¥	(8)	1234	5 Example		
	1817293/1	Example	Refunded Premium	RTRA61.11	Critical Illness Plan - Hybrid		0	-1955.76	100	ADI	Y	(8)	1234	5 Example		
	1817293/2	Example	Refunded Premium	RTPD52.11	Life Insurance Plan (TPD) - Hybrid		0 0	-1638.4	100	ADJ	Y	(8)	1234	5 Example		
	1817292/1	Example	Refunded Premium	R0TH49 11	Life Insurance Plan - Hybrid		0	-2202.08	100	401	Y	(8)	1234	5 Example		
	1817292/2	Example	Refunded Premium	RTPD52.11	Life Insurance Plan (TPD) - Hybrid		0	-2849.36	100	401	Y	(8)	1234	5 Example		
	1817253/1	Example	Refunded Premium	PTP361 11	Critical Illoan Plan - Mybrid		0	-1955 26	100	401	Y.	(8)	1234	5 Example		
	1817293/2	Example	Refunded Premium	RT0052 11	Life Insurance Plan (TPD) - Hybrid		0	-1638.4	100	401	Y	(8)	1234	5 Example		
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		Opening Balance This Statement			0.00		
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		Total Payable for Period Retained Balance			-8,645.60		
		Amount Paid / Transferred		:	-8,645.60		
		Closing Balance This Statement		:	0.00		

Commission Dates

To download a summary of commission payment dates:

 Select the Commission Dates link from the Commission Statements tab.

2 A PDF factsheet detailing mid-month and end-month close-off and payment days will download as per image.

Please note: These commission dates are for TAL and Asteron only, not BT Life.



2023 Commission Dates

	Mid-n	honth	End-month				
Month	Close-off day *	Payment day	Close-off day *	Payment day			
January	15/01/2023	18/01/2023	31/01/2023	03/02/2023			
February	15/02/2023	20/02/2023	28/02/2023	03/03/2023			
March	15/03/2023	20/03/2023	31/03/2023	05/04/2023			
April	15/04/2023	19/04/2023	30/04/2023	03/05/2023			
Мау	15/05/2023	18/05/2023	31/05/2023	05/06/2023			
June	15/06/2023	20/06/2023	30/06/2023	05/07/2023			
July	15/07/2023	19/07/2023	31/07/2023	03/08/2023			
August	15/08/2023	18/08/2023	31/08/2023	05/09/2023			
September	15/09/2023	20/09/2023	30/09/2023	05/10/2023			
October	15/10/2023	18/10/2023	31/10/2023	03/11/2023			
November	15/11/2023	20/11/2023	30/11/2023	05/12/2023			
December	15/12/2023	20/12/2023	31/12/2023	04/01/2024			

Payment is processed 3 business days after close-off

New Business Commission is included on either run as the business completes. Renewal Commission is included on the End-Month Commission run.

For more information:

TAL's Adviser Service Centre on 1300 286 937
commissions@tal.com.au
www.tal.com.au



Important information: This information is prepared for adviser use only. Current as at December 2022.

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

Important Information: © TAL Services Limited – 10 July 2023

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TAL Life Insurance Services Limited | ABN 31 003 149 157 | AFSL 233 728 TAL7950/0219