

Getting started in TAC

How to login to TAC, change your password, and manage your account settings

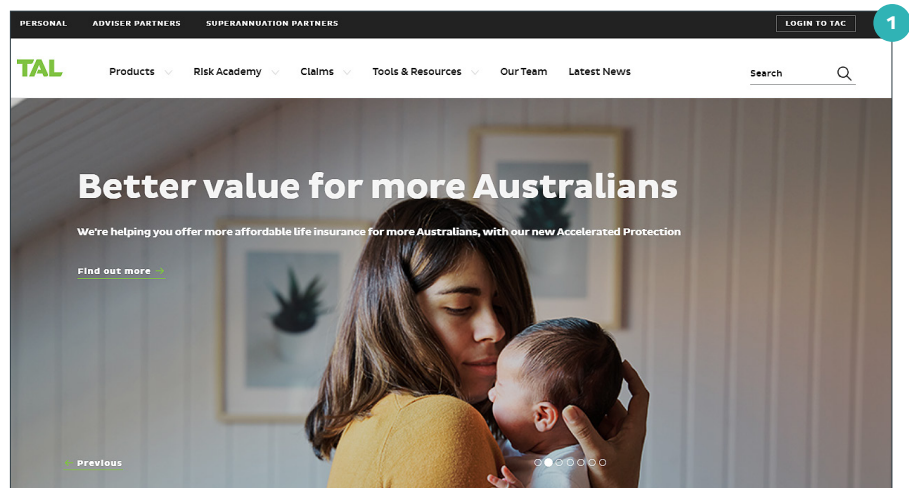
TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

Logging in

To access TAL Adviser Centre:

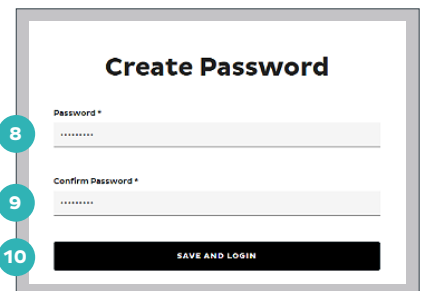
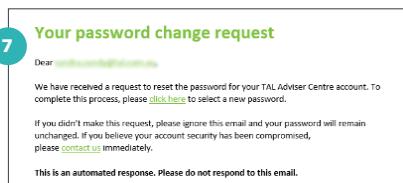
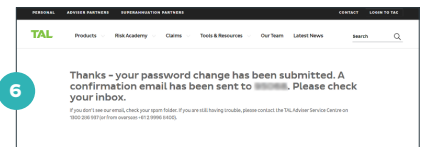
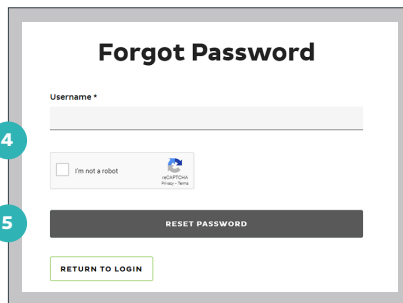
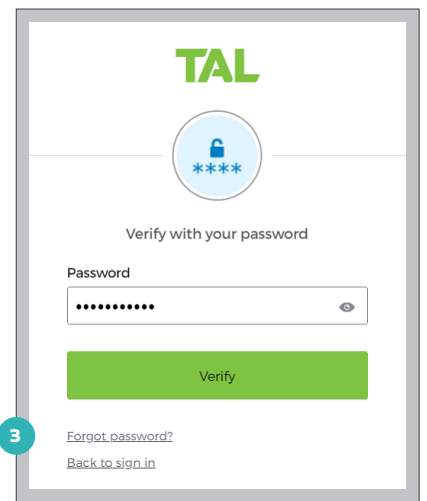
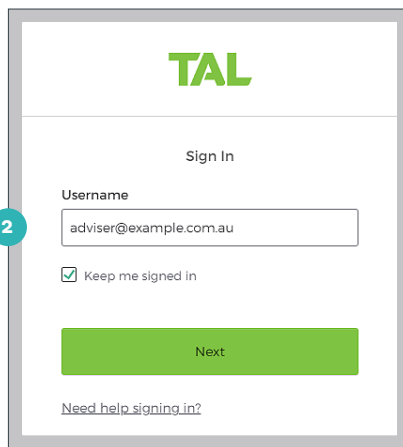
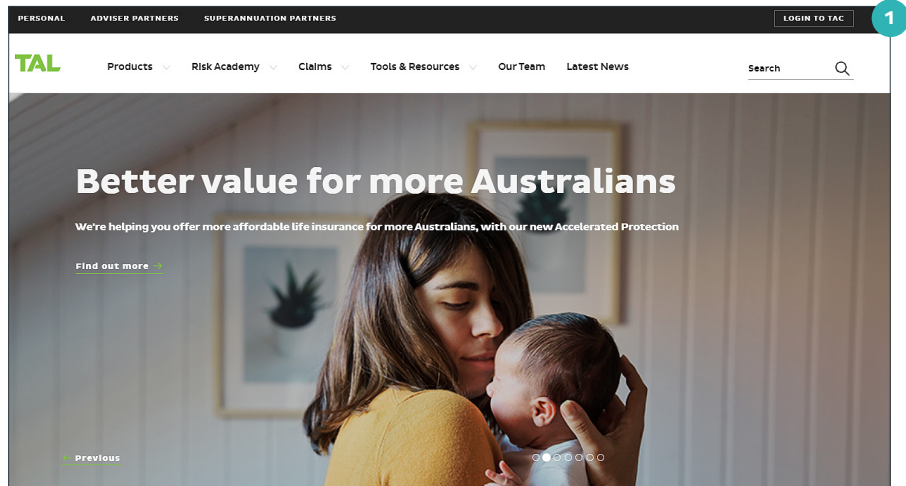
- 1 Navigate to the login panel in the top right of the adviser.tal.com.au home page.
- 2 Enter your **adviser code or email address** in the username field. Your username is the adviser code or email address associated with your TAC account.
- 3 Select **Keep me signed in**.
- 4 Select **Next**.
- 5 Enter your password and select **Verify**. Select **Forgot password** to reset. See **Resetting your password** for more information.



Resetting your password

To reset your password from the login screen:

- 1 Navigate to the login panel in the top right of the adviser.tal.com.au home page.
- 2 Enter your **adviser code or email address** in the username field and select **Next**.
Your username is the adviser code or email address associated with your TAC account.
- 3 Select **Forgot password**.
- 4 Enter your **username** and complete the CAPTCHA.
- 5 Select **Reset password**.
- 6 A confirmation message will appear notifying you that the request has been completed successfully.
- 7 Check your inbox for your request confirmation email and select the **Click here** link.
- 8 Create a new password. 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.
- 9 Re-enter your password.
- 10 Select **Save and Login**.



Managing access

Account administrators can control who has access to their TAC account by adding or removing user permissions.

To add a new user:

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

OR

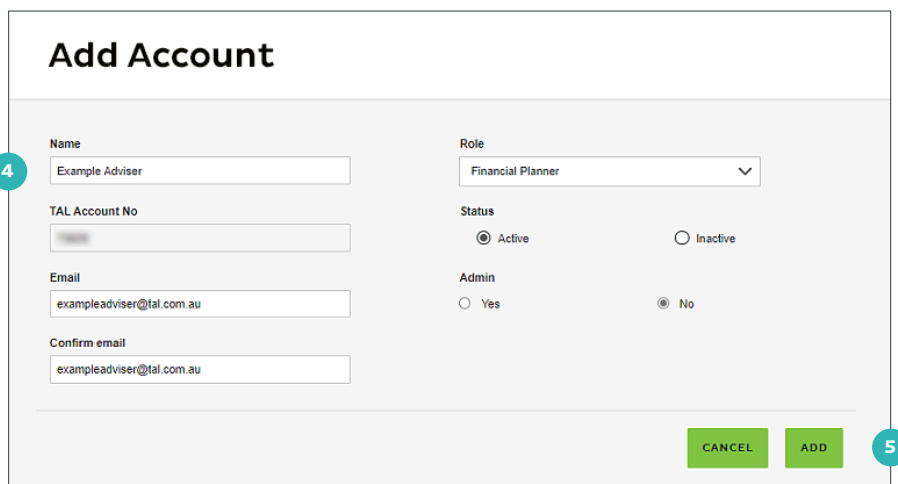
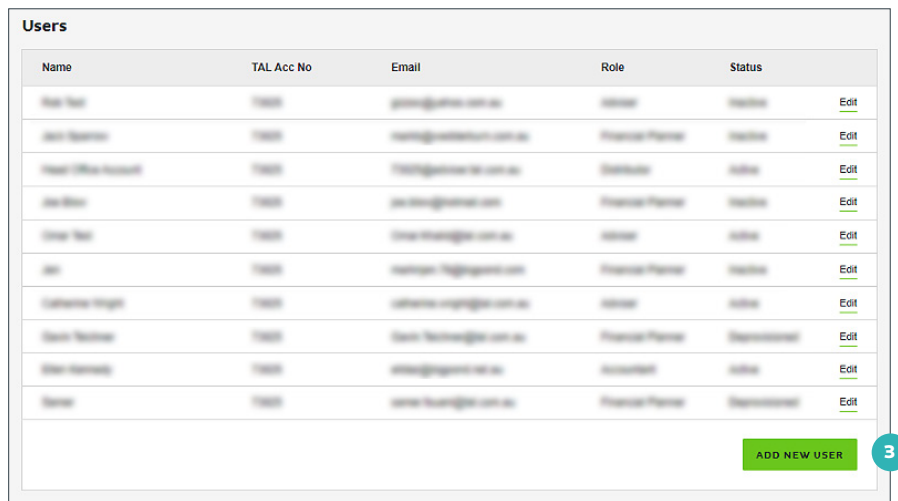
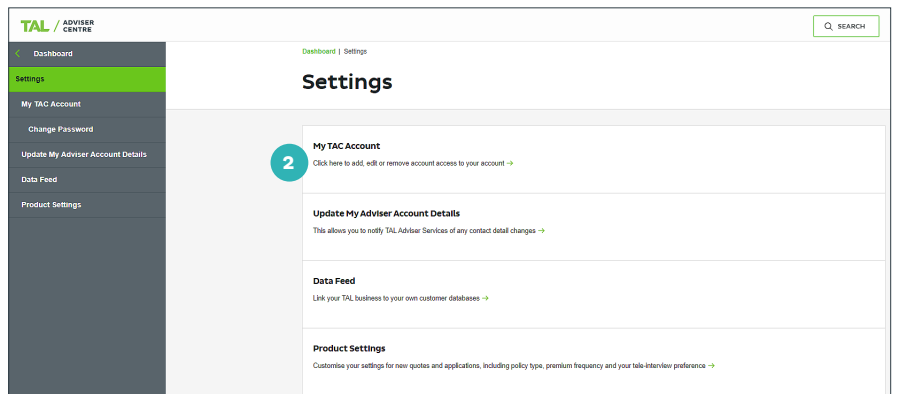
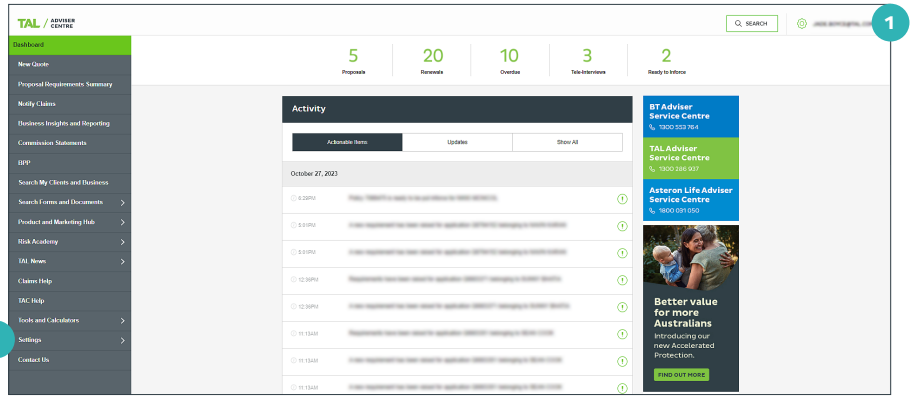
Select **Settings** from the left-hand navigation panel.

- 2 Select **My TAC Account** from the Settings menu.

- 3 Select **Add New User**.

- 4 Complete the form with details of the name, email address and role of the new user.

- 5 Select **Add** to confirm. An email with login instructions will be sent to the new user's inbox.



To edit the permissions of an existing user:

- 1 Identify a user and select **Edit** in the right-hand column next to their name.
- 2 Use the drop-down menu to edit the user's role. e.g:
 - Financial Planner
 - Adviser
 - ParaPlanner
 - Adviser Support Staff
 - Accountant
- 3 Use the radio buttons to toggle a user's status. Selecting **Inactive** will disable their access.
- 4 Use the radio buttons to toggle a user's **Admin** permissions. Admin users have the ability to add new users to an account.
- 5 Select **Update** to save your changes.

Users

Name	TAL Acc No	Email	Role	Status	
John Doe	1234	john.doe@tal.com.au	Adviser	Active	Edit
Jane Smith	1234	jane.smith@tal.com.au	Financial Planner	Active	Edit
Mark Whitehead	1234	mark.whitehead@tal.com.au	Editorial	Active	Edit
Joe Blog	1234	joe.blog@tal.com.au	Financial Planner	Active	Edit
Chris Lee	1234	chris.lee@tal.com.au	Adviser	Active	Edit
Ali	1234	ali@tal.com.au	Financial Planner	Active	Edit
Catherine Knight	1234	catherine.knight@tal.com.au	Adviser	Active	Edit
Sam Thomas	1234	sam.thomas@tal.com.au	Financial Planner	Deactivated	Edit
Alan Thomas	1234	alan.thomas@tal.com.au	Accountant	Active	Edit
Steve	1234	steve@tal.com.au	Financial Planner	Deactivated	Edit

ADD NEW USER

Edit Account

<p>Name</p> <input type="text" value="Example Adviser"/>	<p>Role</p> <p>2 <input type="text" value="Financial Planner"/></p>
<p>TAL Account No</p> <input type="text" value="1234"/>	<p>Status</p> <p>3 <input checked="" type="radio"/> Active <input type="radio"/> Inactive</p>
<p>Email</p> <input type="text" value="exampleadviser@tal.com.au"/>	<p>Admin</p> <p>4 <input type="radio"/> Yes <input checked="" type="radio"/> No</p>
<p>Confirm email</p> <input type="text" value="exampleadviser@tal.com.au"/>	

CANCEL **UPDATE**

Updating your account

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.

The screenshot shows the TAL Adviser Centre dashboard. At the top right, there is a search bar and a user profile icon with a cogwheel, marked with a red circle '1'. Below the dashboard header, there are several statistics: 5 Proposals, 20 Renewals, 10 Overdue, 3 Tab Interviews, and 2 Ready to Interview. The main content area is titled 'Activity' and shows a list of recent activities. On the right side, there are service center contact information for BT Adviser Service Centre and TAL Adviser Service Centre, and a promotional banner for 'Better value for more Australians'.

The screenshot shows the 'Settings' page in the TAL Adviser Centre. The left-hand navigation menu is visible, with 'Settings' highlighted. The main content area is titled 'Settings' and contains three sections: 'My TAC Account', 'Update My Adviser Account Details', and 'Data Feed'. The 'Update My Adviser Account Details' section is marked with a red circle '2' and contains the text: 'This allows you to notify TAL Adviser Services of any contact detail changes ->'. Below this, there are sections for 'Data Feed' and 'Product Settings'.

Update My Adviser Account Details

Your Contact Details
Please Complete your contact details below should we need to contact you regarding the details

Name: Update details for: **XXXXX_john.brown@tal.com.au**

Contact Number:

Email Address:

Update Details

Business Phone No:

Home Phone No:

Fax No:

Mobile No:

Email Address:

Business Address

Address Line 1:

Address Line 2:

Suburb:

State:

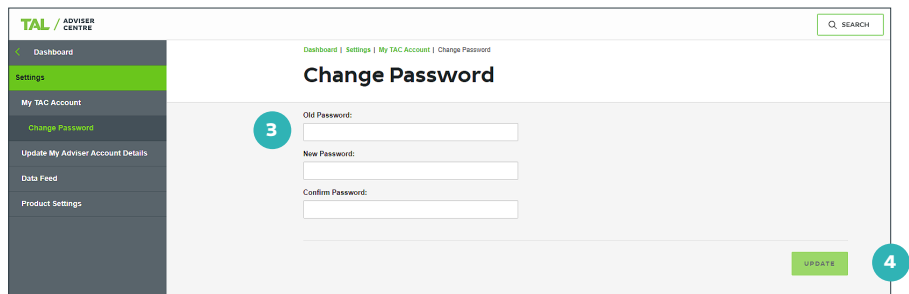
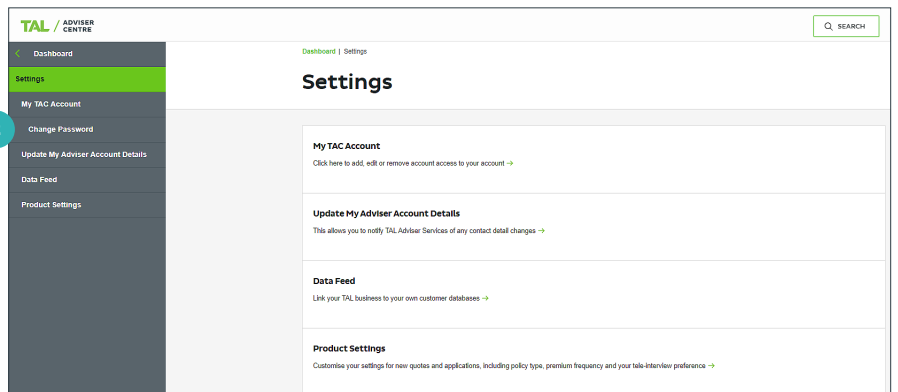
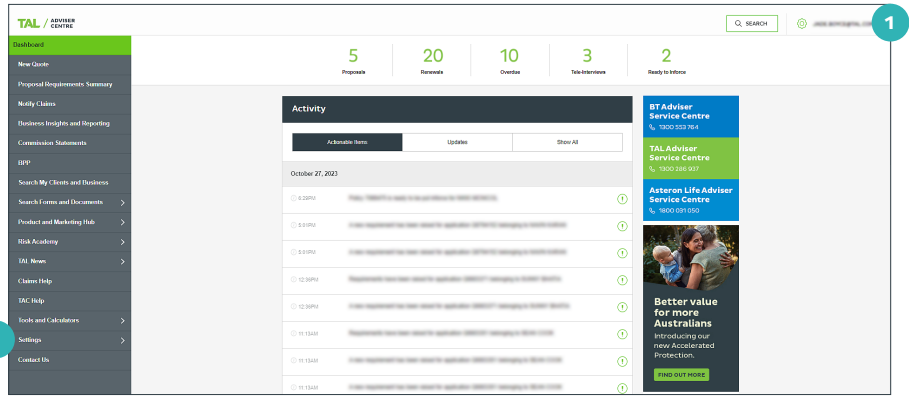
Postcode:

Country:

Changing your password

To change your password after logging-in to TAC:

- 1 Select the cog icon next to your username, followed by **Account Settings**
OR
Select **Settings** from the left-hand navigation panel.
- 2 Select **Change Password**.
- 3 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.
- 4 Select **Update** to save.
Confirmation of the password change will be sent to your inbox.



For more information, please contact us on the details below:
TAL and Asteron Life: 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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