

Applications in TAC

This Quick Reference Guide outlines how to convert a quote to an application and how to download applications in TAC.

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

Applying for cover

Start your application

- 1 After the quote has been created or resumed, click 'Apply' to begin the application.

Note: If the Apply button isn't enabled, check that you've entered all the required information for the quote.

The screenshot displays the 'Quote #1' application form in the TAL Adviser Centre. The interface is divided into a sidebar on the left and a main content area. The sidebar shows the quote details, including the total advised premium of \$1,028.40 and a green 'APPLY' button. The main content area shows the 'Quote #1' form with sections for 'Life Insurance' and 'Attached TPD'. The 'Life Insurance' section includes fields for 'Sun Insured' (\$500,000), 'Stopped', and 'Level To Age' (65 and 70). The 'Attached TPD' section includes fields for 'Sun Insured' (\$500,000), 'Stopped', and 'Level To Age' (65 and 70). There are also sections for 'Attached Insurance' and 'Benefit Options' with various checkboxes. A green '1' in a circle highlights the 'APPLY' button in the sidebar.

Using the left-hand navigation

The left-hand navigation shows the current state of an application and lets you to quickly move to different sections that don't require any prerequisite information, including:

- Duty of Disclosure
- Applicant/s Details (including personal, occupation and income details, insurance history, tele-interview status, health and lifestyle details, and additional information)
- Assessment Summary
- Policy Owner Details
- Finalise Application.

The following legend highlights the status of each section:

- Ready to complete
- Section complete
- Further information required.

- 1 Changes in the quote may mean information needs to be re-entered in the application
- 2 The Applicant/s Details and Finalise Application sections have subsections that also need to be completed. The number of sections to be complete are shown to the left of the section name
- 3 When navigating the application, you can jump between sections by clicking the section name
- 4 Any section or subsection that's greyed out can't be completed until the previous section or subsection has been completed in full
- 5 Additional applicants will display under the first Applicant/s Details section
- 6 The Finalise Application section is where you can choose your Policy Commencement option, set your Commission adviser and elect to agree to electronic signature
- 7 The Submit Application button will activate once all the sections have been completed and the Application Summary reviewed

The screenshot shows a mobile application interface for 'AP 2.0 Application'. At the top is a 'Back to Quote' button (1). Below it is a list of sections: 'Duty of Disclosure' (checked), 'daisy meadows' (5/7, dropdown), 'trevor medows' (6/7, dropdown), 'Allan Medows' (5/7, up arrow) (2), 'Personal Details' (checked), 'Occupation Details' (checked), 'Income Details' (checked) (3), 'Insurance History' (checked), 'Tele-interview Service' (checked), 'Health And Lifestyle' (checkbox), 'Additional Information' (warning icon) (4), 'Assessment Summary' (warning icon), 'Policy owner details' (warning icon), 'Finalise Application' (0/3, checkbox) (6), 'Commencement & Commissions' (checkbox), 'Policy Declaration & Authority' (checkbox), and 'Application Submission Instructions' (checkbox). At the bottom is a 'SUBMIT APPLICATION' button (7).

Personal Details section

- 1 Personal records will be populated from the quote record. Amend and complete the fields as needed. All fields are mandatory, unless they include the word 'optional' in the field title
- 2 Pre-assessments can be linked in this section. Click 'Link Pre-assessment' and add the reference number/s provided by TAL
- 3 When typing in an address, a dropdown list of matching addresses will appear. If the address you're entering doesn't appear, you can enter it manually
- 4 Once the page is complete, click 'Save and continue' to move on.

Personal Details

Title:
Ms ▼

Sex:
 Female Male

Date of Birth:

First Name:
Daisy

Middle Name (Optional):

Last Name:
Meadows

Previous Last Name (Optional):

If the life insured has been pre-assessed for this application and a Pre-assessment reference number provided, please enter below

Link Pre-assessment

Contact Number 1
0411111111

Contact Number 2 (Optional)

Email Address
Daisy@dot.com

Confirm Email Address
Daisy@dot.com

Residential Address

Country
Australia ▼

Address
Level 9 357-363 George Street, SYDNEY NSW 2000

Can't find your address? [Click here to enter it manually](#)

REMOVE SEPARATE MAILING ADDRESS

Mailing Address

Country
Australia ▼

Address
Level 9 357-363 George Street, SYDNEY NSW 2000

Can't find your address? [Click here to enter it manually](#)

SAVE AND CONTINUE

Policy Owner Details section

In this section, you can:

- 1 Move between policies by clicking on the tabs
- 2 Change the policy ownership if required
- 3 In the Payment Details section, you can:
 - Copy payment details from the other policies in the application
 - Change the policy's payment frequency
 - Select the payment method.
 - Enter the payment details.

Policy Owner Details

daisy meadows

TAL Super

Policy 2

Owner: Mercer Superannuation (Australia) Limited

ABN: 79004717533

AFSL: 235906

Address: 727 Collins Street, VIC 3008

Phone Number: 1300 209 088

Eligibility To Contribute
 I confirm I am aged less than 65.
The trustee may accept any type of contribution for a member aged less than 65 and is not required to test whether the member is in gainful employment before accepting the contribution.

Contribution Type
Rollover ▼

Ownership: TAL Super ▼

Payment Details Copy from daisy meadows

Payment Amount **\$97.78**

Payment Frequency
Monthly ▼

Payment Method
Rollover ▼

Enter either your Superfund name, ABN or USI to find a matching complying superfund

Name of Superannuation Fund

Transferring Fund ABN

Transferring Fund USI

Member Account Number

Policy Owner Details section

Continued

- 4 For TAL Super policies, you need to confirm that your client is eligible to contribute
- 5 The payment options that display are dependent on the Contribution Type selected, including:
 - 'Rollover' will display the super fund details to be completed (as shown)
 - 'Employer' will display SuperStream as a payment method option
 - 'Member' will display the option for the client to claim their premiums as a tax deduction
- 6 Nominate beneficiaries, including binding and non-binding for TAL Super policies
- 7 Once the page is complete, click 'Continue' to move on.

Policy Owner Details

daisy meadows ⓘ
TAL Super ⓘ

Ownership:
TAL Super ▼

Policy 2

Owner: Mercer Superannuation (Australia) Limited

ABN: 79004717533

AFSL: 235906

Address: 727 Collins Street, VIC 3008

Phone Number: 1300 209 088

Eligibility To Contribute

I confirm I am aged less than 65.

The trustee may accept any type of contribution for a member aged less than 65 and is not required to test whether the member is in gainful employment before accepting the contribution.

Contribution Type

Rollover ▼

Payment Details

Copy from daisy meadows

Payment Amount \$97.78

Payment Frequency

Monthly ▼

Payment Method

Rollover ▼

Enter either your Superfund name, ABN or USI to find a matching complying superfund

Name of Superannuation Fund

Transferring Fund ABN

Transferring Fund USI

Member Account Number

Would you like to nominate a beneficiary?

Yes No

CONTINUE

Finalise Application section

This section will become active once the previous sections are complete, and is where you can choose your commencement and commission options.

- 1 Policy commencement includes three options:
 - TAL will place the policy in force when it's ready
 - You'll be notified when the policy is ready for you to place in force
 - Select a preferred risk commencement date
- 2 Commissions will populate by default from those in the quote. You can split commissions here and:
 - Add additional advisers to the application
 - Enter the commission percentage each adviser will receive for New Business and Servicing commissions
- 3 The 'Policy Declaration & Authority' section is where you can agree or disagree to the electronic signature process.

Finalise Application

Policy Commencement

Please select one of the following to choose when this application's policy(ies) start:

I want TAL to place this application in force as soon as possible.

I want to put this application in force myself. You can control the risk commencement date. [Click here to learn how.](#)

I want to enter a preferred risk commencement date.

Commissions

Do you want to split commissions across advisers?

Yes No

Main Adviser

Main commission adviser:	New Business (%):	Servicing (%):
12345 ▼	100 %	100 %

Adviser 2

Commission adviser:	New Business (%):	Servicing (%):
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

DELETE

Policy Declaration and Authority

Electronic Signature Authority for Company Life Pty Ltd 12345

You confirm that in completing this online application for life insurance your client (being the life insured(s) and policy owner (where they are an individual)):

- is in your immediate vicinity and has provided you with instructions on how to complete the Policy Declaration and Authority and to apply for the life insurance contract; or
- has issued you instructions by telephone on how to complete the Policy Declaration and Authority and to apply for the life insurance contract; or
- has issued you with written instructions on how to complete the Policy Declaration and Authority and to apply for the life insurance contract and you have retained these instructions on your file.

I agree I disagree

CONTINUE

Application Submission section

In this final section, you need to confirm the following:

- 1 Disclose if this is a Concurrent Group Application Request
- 2 Review and download an Application Summary PDF. The 'Submit Application' button won't become active until the 'Application Summary PDF' link is clicked

Note: if you select 'I disagree' for electronic signature authority, the 'Declaration & Authority' section will appear, where you need to:

- Download a PDF of the declaration and authority form for applicant/s to sign
- Upload the signed PDF by giving it a description, then dragging and dropping the file or browsing to upload. Click 'OK' when you're done

- 3 Submit the application once it's complete by clicking 'Submit Application' in the left navigation bar. If the button is inactive, double-check you've downloaded the Application Summary PDF.

How to download an application in TAC

- 1 To locate the client record, select **Search** from the TAC home dashboard

OR

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

How to download an application in TAC

Continued

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 Expand the client record by selecting the **plus (+)** icon

5 Click on **View Application**

6 Download application

This screenshot shows the search results for 'Daisy Meadows'. The search bar contains 'Daisy Meadows' and a magnifying glass icon. Below the search bar, there is a hint and a 'Showing 1 - 8 of 8 for "Daisy Meadows"' indicator. The results are displayed in a table with columns for 'First Name', 'Last Name', and 'Date of Birth'. The first row shows 'Daisy Meadows' with a date of birth. A plus sign icon is visible next to the row, indicating it can be expanded.

This screenshot shows the search results for 'Daisy Meadows' with the client record expanded. The table now includes columns for 'Product', 'Origin', 'Reference #', 'Details', and 'Premium'. The first row shows 'Accelerated Protection' with a reference number '12345678', 'Submitted' status, and '\$438.48 Yearly' premium. A 'View Application' link is visible next to the premium amount.

This screenshot shows the 'Accelerated Protection' application details page. It displays the application status as 'Submitted' and the annual premium as '\$12,912.00'. There are two 'View Application Proposal' buttons. Below this, there are several download links for application summaries and a quote illustration. A magnifying glass icon is visible next to the download links.

How to download an application from the Proposals tab in TAC

1 Select **Proposals** in the top navigation in TAC

2 Select the client's name you wish to view the application for

This screenshot shows the TAC dashboard with the 'Proposals' tab selected in the top navigation. The dashboard displays several key metrics: 50 Proposals, 770 Renewals, 124 Overdue, 5 Tele-Interviews, and 3 Ready to Inforce. A magnifying glass icon is visible next to the 'Proposals' metric.

This screenshot shows the search results for 'Daisy Meadows' in the 'Proposals' tab. The search bar is empty, and the results are displayed in a table with columns for 'First Name', 'Last Name', and 'Date of Birth'. The first row shows 'Daisy Meadows' with a date of birth. A plus sign icon is visible next to the row, indicating it can be expanded.

How to download an application from the Proposals tab in TAC

Continued

- 3 Scroll down to the bottom of the page and select **View Application**
- 4 Download application

DAISY MEADOWS Adviser: [REDACTED]

D.O.B: [REDACTED] Occupation / Occupation Rating: [REDACTED] Smoker Status: Smoker
 Gender: [REDACTED] Quoted Annual Income: \$120,000 Self Employed: No

Insurance Overview Total Annual Premium: **\$12,912.60**

Accelerated Protection

Policy Origin: TAL
 Policy number: [REDACTED] Premium: \$8,643.36 p.a.
 Status: Proposal
 Policy owner: [REDACTED]

Life Insurance \$1,250,000.00
 Total and Permanent Disability Insurance \$525,000.00

[VIEW POLICY \[REDACTED\] DETAILS](#)

Accelerated Protection

Policy Origin: TAL
 Policy number: [REDACTED] Premium: \$4,269.24 p.a.
 Status: Proposal
 Policy owner: [REDACTED]

Critical Illness Insurance \$150,000.00

[VIEW POLICY \[REDACTED\] DETAILS](#)

Applications in progress

Application	Status	Premium	Link
TAL Accelerated Protection	Submitted	Annual Premium \$12,912.60	View Application 3

Accelerated Protection | [REDACTED]

Application Status: Submitted [View Application Proposal 1](#)

Annual Premium: \$12,912.60 [View Application Proposal 2](#)

Adviser Name: [REDACTED]
 Adviser Number: [REDACTED]

- [Download Application Summary Life Insured](#)
- [Download Application Summary Standard](#)
- [Download Application Summary Internal](#) 4
- [Download Quote Illustration](#)
- [Concomitant Group Application](#)

If you need a hand, contact us on **1300 286 937** or via email at accelerateservice@tal.com.au

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