

# Adviser Contact Card

FOR ADVISER USE ONLY | Use from 1 April 2025

| At your service:                              | Can help you with the following:                                                                                                                                                                                                                | Contact details:                                                                                                           |
|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <b>Adviser Services<br/>General enquiries</b> | <ul style="list-style-type: none"> <li>- General enquiries including Business Development support</li> </ul>                                                                                                                                    | 1300 553 764                                                                                                               |
| <b>Underwriting</b>                           | <ul style="list-style-type: none"> <li>- Enquires relating to underwriting assessment and requirements</li> <li>- Guidance on explaining underwriting outcomes</li> </ul>                                                                       | 1300 553 764                                                                                                               |
| <b>New Business</b>                           | <ul style="list-style-type: none"> <li>- Support during the new business application</li> <li>- Email enquiries relating to underwriting assessment and requirements and proposal progress</li> <li>- General new business enquiries</li> </ul> | 1300 553 764<br>PPUWAlterations@tal.com.au                                                                                 |
| <b>In force Policy Services</b>               | <ul style="list-style-type: none"> <li>- Support with policy alterations process and forms</li> <li>- Quotes for Increasing and decreasing of cover</li> <li>- Cancel and replacement of policy due to change of ownership</li> </ul>           | PPInsurance@tal.com.au<br>In-force quotes request for changes to existing policies:<br>PPQuotes@tal.com.au                 |
| <b>Claims</b>                                 | <ul style="list-style-type: none"> <li>- Understanding the BT claims process</li> <li>- Claims hypothetical questions</li> <li>- Claims training</li> </ul>                                                                                     | 1300 553 764<br>General claims enquiries:<br>lifecclaims@tal.com.au<br>Hypothetical claims questions:<br>claims@tal.com.au |
| <b>Product Technical</b>                      | <ul style="list-style-type: none"> <li>- Product queries</li> <li>- Tax implications</li> <li>- Business, insurance, and superannuation strategies</li> </ul>                                                                                   | askanexpert@tal.com.au                                                                                                     |
| <b>Technology</b>                             | <ul style="list-style-type: none"> <li>- For any issues or technical support with the TAL Adviser Centre</li> </ul>                                                                                                                             | 1300 286 937                                                                                                               |
| <b>Commissions</b>                            | <ul style="list-style-type: none"> <li>- For any commission enquiries</li> </ul>                                                                                                                                                                | commissions@tal.com.au                                                                                                     |
| <b>Client transfer</b>                        | <ul style="list-style-type: none"> <li>- Request to transfer clients</li> </ul>                                                                                                                                                                 | adviser.admin@tal.com.au                                                                                                   |
| <b>Adviser administration team</b>            | <ul style="list-style-type: none"> <li>- For any adviser code changes</li> </ul>                                                                                                                                                                | adviser.admin@tal.com.au                                                                                                   |

**FOR ADVISER USE ONLY:** This information is current as at 1 April 2025

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The insurer and issuer is TAL Life Limited ABN 70 050 109 450 AFSL 237848 (TAL Life) except for Term Life as Superannuation, Income Protection as Superannuation and Income Protection Assured as Superannuation, which are issued by Mercer Superannuation (Australia) Limited ABN 79 004 717 533 AFSL 235906 (MSAL) as trustee of the Mercer Super Trust ABN 19 905 422 981. MSAL does not guarantee the insurance. TAL is part of the TAL Dai-ichi Life Australia Pty Limited ABN 97 150 070 483 group of companies (TAL). MSAL is not part of the TAL group of companies.

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