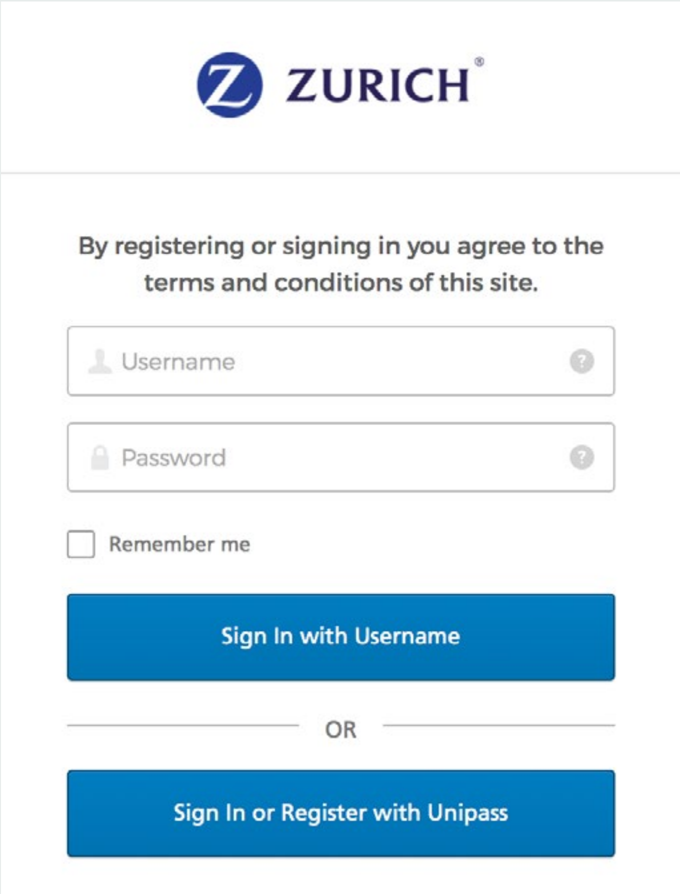
Zurich Life Protection Platform

Life Protection Platform

Onboarding Guide



We want to ensure all of our intermediary partners, their advisers and other staff can easily access and use the Life Protection Platform. This guide will provide you with useful information on how to register your firm, administrators, paraplanners and advisers.

Should you need any further support please get in touch with our eSupport team on 0370 850 4419 or the Agency & Remuneration team on 0800 151 3333.

Steps to register on the Life Protection Platform

There are four key steps you will need to complete to register on the platform.

1 Complete an Origo agency request via Origo Services Limited and sign up to the Zurich Terms of Business (unless you are already registered).

2. Register for Zurich Services and create your username (unless you are already registered).

3. Register Firm and Administrator on the platform.

4. Register the Advisers.

We recommend that you use Google Chrome when completing the registration journey.

The roles on the system

Adviser: Advisers can quote and apply, submit new business, review the pipeline, activate policies and enact contractual changes on their clients' policies.

Paraplanner: Paraplanners can have access to all or specified advisers in their firm to work on their behalf. They cannot set up other paraplanners or administrators or manage their own rights or permissions.

Administrator: This is a "Super User" role with the ability to set up additional administrators and manage paraplanner access to individual advisers. **Only administrators can view commission statements.**

All firms should have **at least one** administrator. We recommend that you have more than one administrator.

Please get in touch with our Agency & Remuneration team on **0800 151 3333** if you have an existing account without an administrator.

The administrator cannot quote and apply for business, unless they give themselves paraplanner rights. For sole trader firms, we recommend that the administrator account is set up with paraplanner rights and authorised to process business on behalf of the adviser account. The adviser will still need to register as an adviser.

Any advisers requiring both administrator and adviser access will still need to register themselves separately as an adviser. This will require the creation of a second username.

To register a firm on the platform you must first set up an administrator before adding paraplanners and advisers.

Registering for Zurich Services

Create your username (for more information, see Register for Zurich Services section)	Unipass

Firms with an existing active Zurich Agency Relationship

If you have an active Zurich Agency relationship, you don't need to complete the Origo agency request.

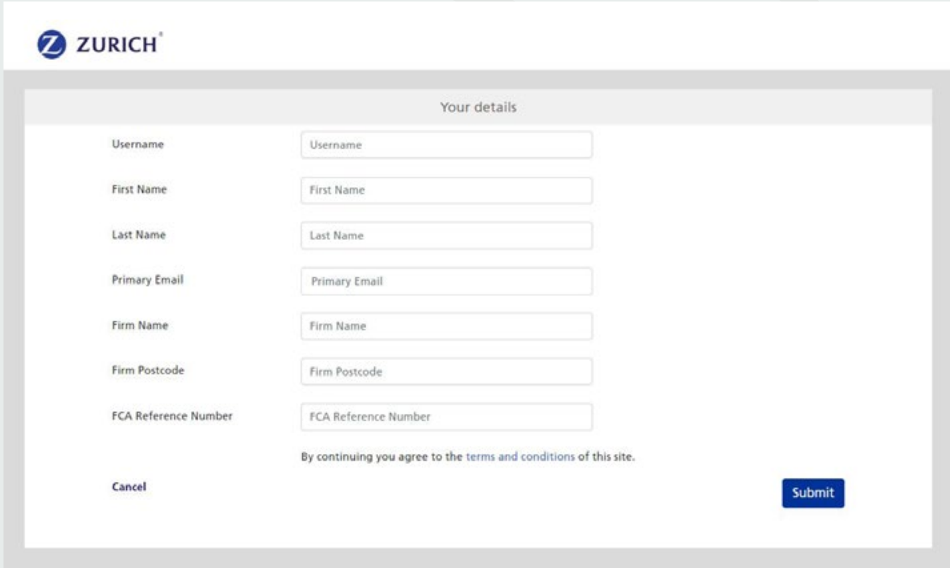
1. Your firm administrator will need to register for Zurich Services and create a username.
2. Once the Zurich Services registration is complete, you can proceed to set up the administrator and firm details on the platform.
3. We will complete the due diligence process and activate your firm's record.

Firms that are new to Zurich or do not have an active Zurich Agency Relationship

1. Start the process through the Origo agency request and sign up to the Terms of Business.
2. We will complete our due diligence process within 5 working days ahead of you registering for Zurich Services and confirm when we've accepted your request.
3. Your firm administrator will need to register for Zurich Services and create a username.
4. Once Zurich Services registration is complete you can then proceed to set up the administrator and firm details on the platform.
5. We will activate your firm's record.

Registering for a Zurich Support username

1. You need to fill in some information about yourself to register for a Zurich Services username.
Your username needs to be between 8 and 10 characters, letter or numbers.



ZURICH

Your details

Username — Username
First Name — First Name
Last Name — Last Name
Primary Email — Primary Email
Firm Name — Firm Name
Firm Postcode — Firm Postcode
FCA Reference Number — FCA Reference Number

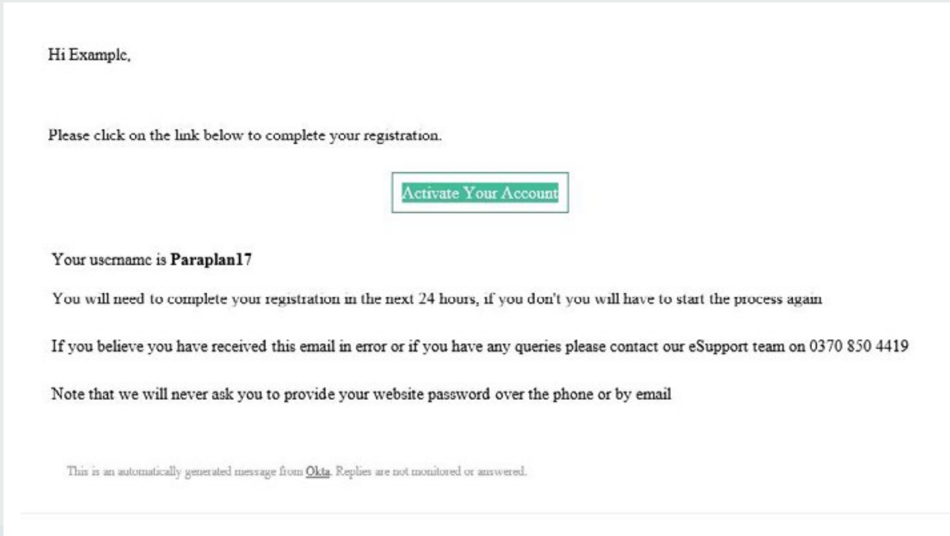
By continuing you agree to the terms and conditions of this site.

Cancel — Submit

If you work for an Appointed Representative firm, you will need to provide us with the FCA number of the AR firm.

2. You will receive an email inviting you to complete the registration.

You don't need to double-click on the Activate Your Account button.



Hi Example,

Please click on the link below to complete your registration.

Activate Your Account

Your username is **Paraplan17**

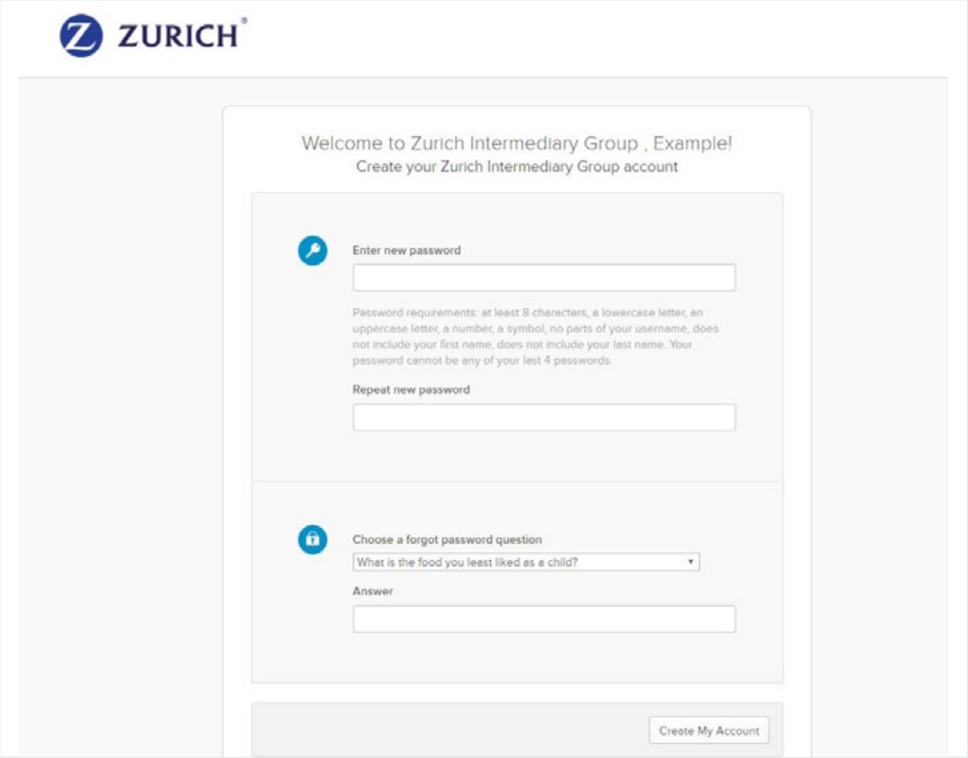
You will need to complete your registration in the next 24 hours, if you don't you will have to start the process again

If you believe you have received this email in error or if you have any queries please contact our eSupport team on 0370 850 4419

Note that we will never ask you to provide your website password over the phone or by email

This is an automatically generated message from Okta. Replies are not monitored or answered.

3. The next step is to set up your password and your security question. You can use the same password if you have multiple accounts.



Registering the firm and the first administrator

Regardless of whether the administrator being set up is an existing user or not they will enter their details on the same screen.

This will then allow firms to create the hierarchy between the advisers and paraplanners that they require. For example, a firm may decide that it wants all of its paraplanners to work across all advisers, or to align paraplanners to certain advisers (refer to Paraplanner registration).

We recommend that you set up more than one administrator and give them paraplanner rights as well.

Please note that Appointed Representative firms cannot be set up on the Life Protection Platform until their FCA authorised Principal firm has completed the registration process and has been activated.

To start the registration process, click here and follow the appropriate journey.

The firm registration process should only be completed by someone with the authority to act on behalf of the registering firm and accept terms of business/use. Please don't start the process until you have created an appropriate Username for the purpose of fulfilling the administrator role.

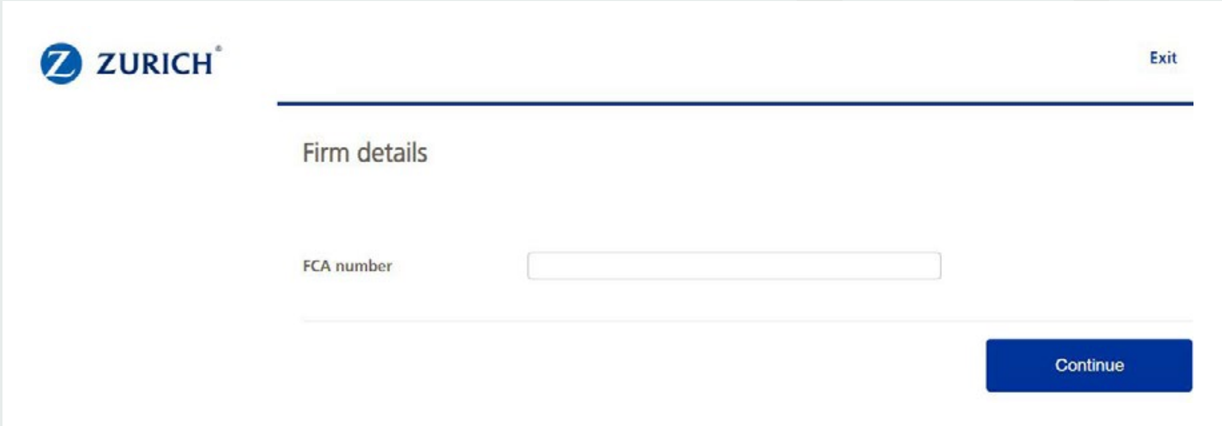
1. Complete Origo agency request (if required)
2. Zurich completes the Due Diligence process and autorises the firm
3. Register the firm on the platform
4. Zurich reviews the registration and activates the firm's record
5. Register the advisers on the platform

All five steps of the registration process must be completed before you can start using the platform. Please note that Step 5 cannot be completed until we have confirmed that your firm has been activated in Step 4.

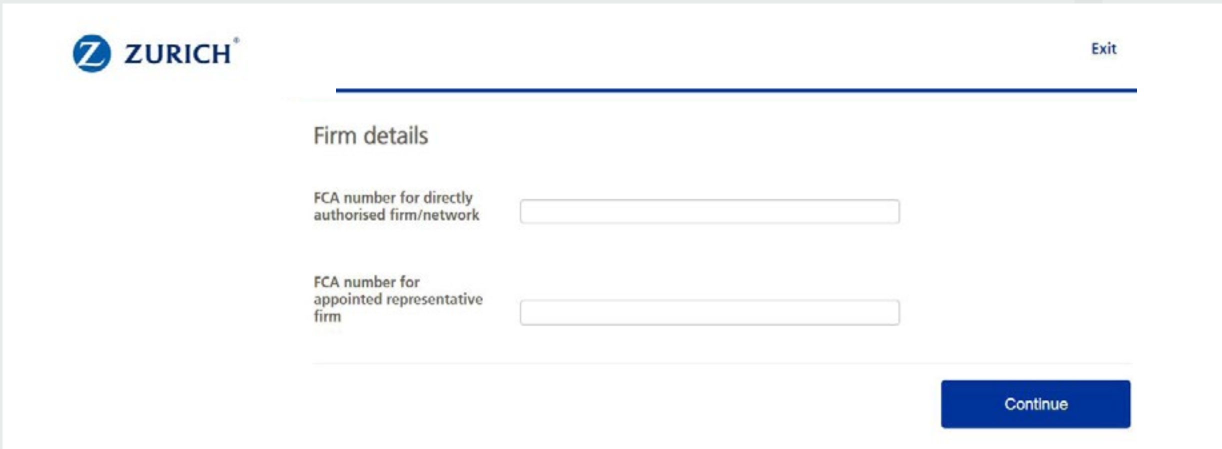
Firm registration

1. You will need to enter your firm's FCA/FRN number.

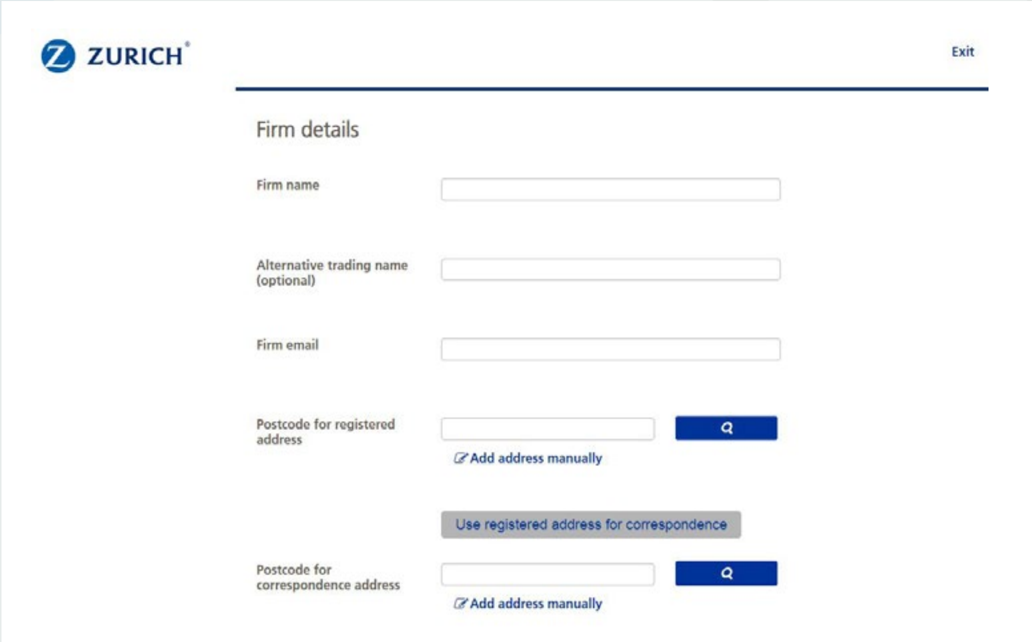
   a. Directly Authorised (DA) Firm



   b. Appointed Representative (AR) Firm.

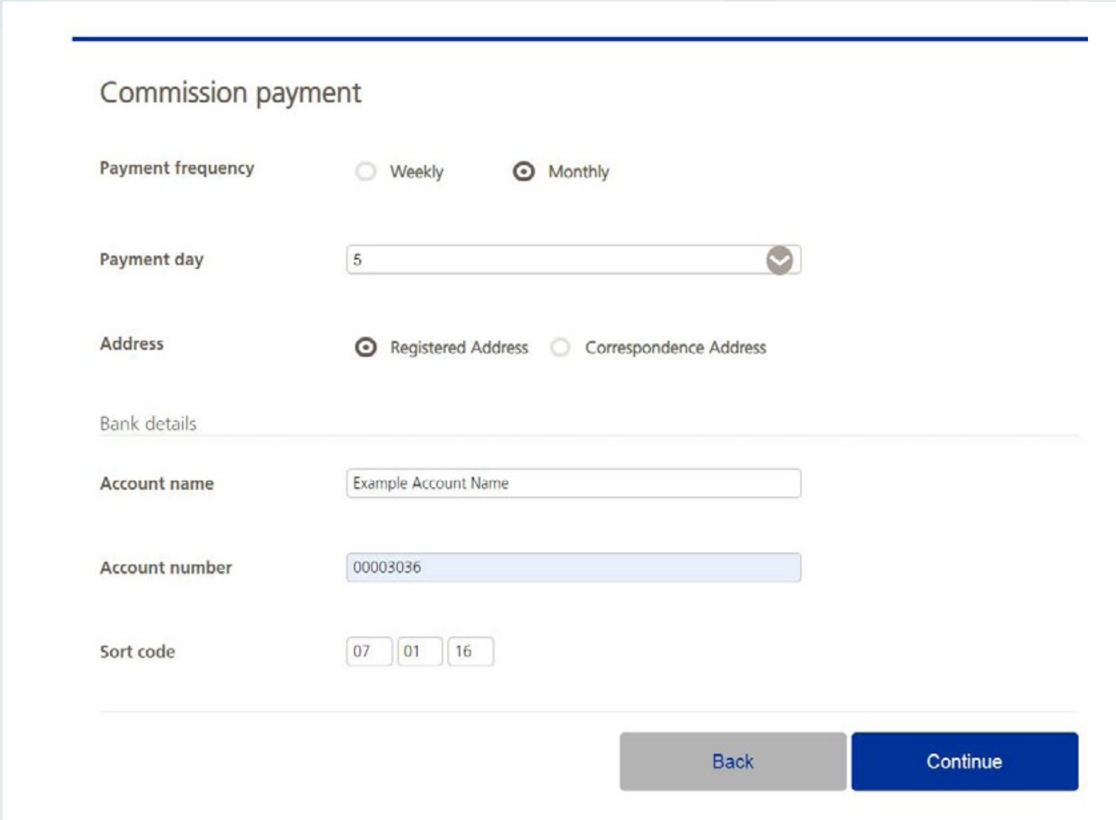


2. Once your firm is identified by your FCA number, you are asked to fill in your e-mail address and postal address (either by postcode look up or by entering manually).



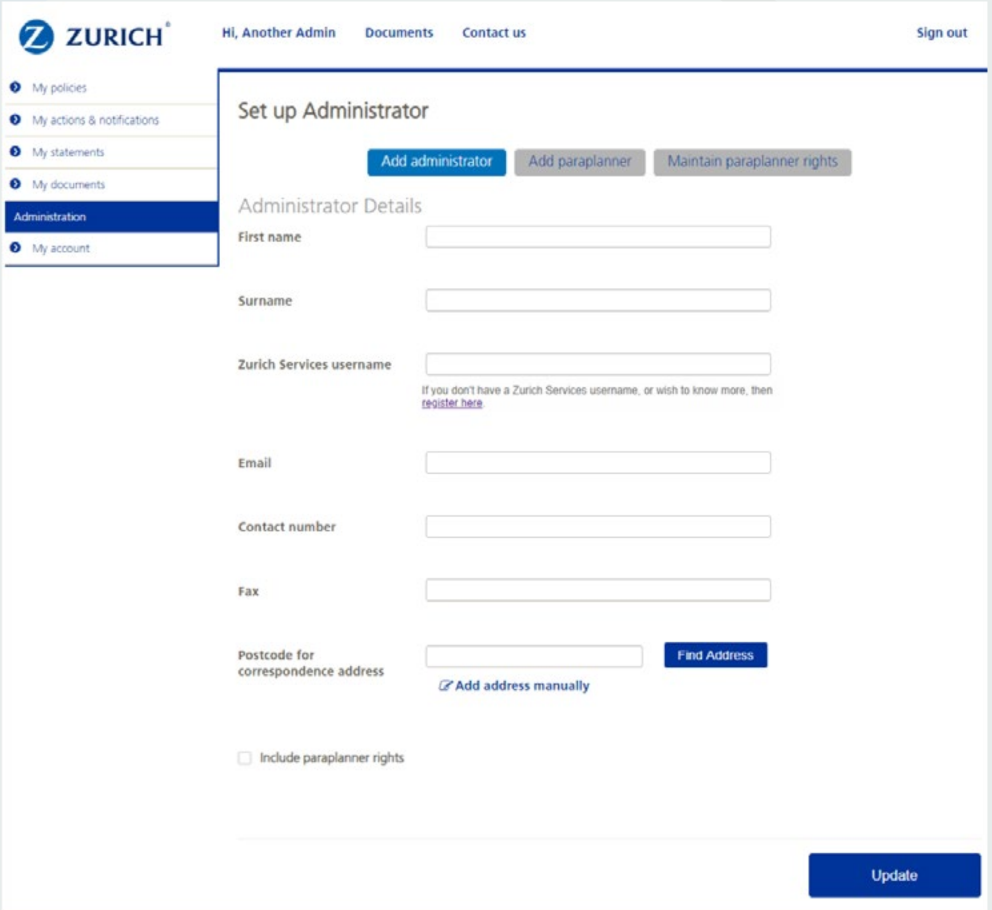
3. You will be given the opportunity to capture a different correspondence address or to confirm that you wish to use the registered address for correspondence. In addition, you can indicate your correspondence preference, by post or e-mail.

4. The next screen offers you the opportunity to determine the payment frequency for commission and the bank account you wish the commission to be paid into. Please note, if you are an Appointed Representative of another firm this screen is not displayed, the payment details are set by the FCA Principal firm.

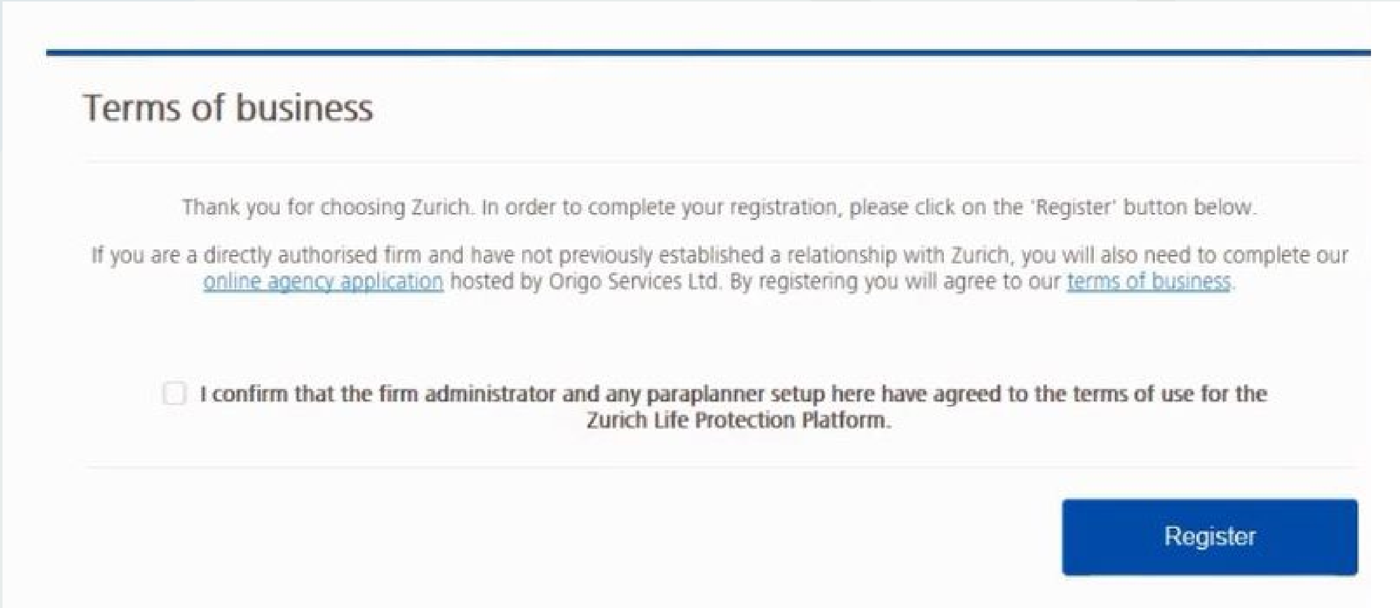


5. Next, you are asked to capture the firm’s preference regarding the commission payable. Please note, whilst commission preferences can be indicated, these may be subject to change at the conclusion of our internal due diligence processes.

6. You must set up an administrator, give paraplanner rights or set up additional paraplanners if required.



7. After completing the administrator details, you must confirm that you accept the Terms of Business.



Registering administrators and paraplanners

Existing administrators are able to add new administrators and paraplanners on behalf of the firm.

If a new administrator or paraplanner who is being set up has previously registered for Zurich Services, there is an option to use their current credentials to access the Life Protection Platform or their Unipass account.

If they can't remember their current username, or they sign in with a Unipass certificate, they can contact eSupport for details on 0370 850 4419.

New users

Registering for Zurich Services

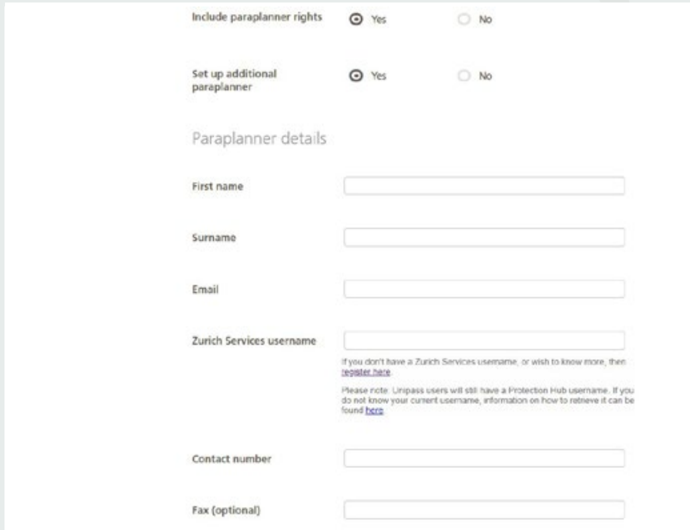
[Create your username](#)
(for more information, see Register for Zurich Services section, below)

[Unipass](#)

Once the new administrator or paraplanner has created a Zurich Services username, they will need to share it with the first administrator in order to be added to the system. The administrator will enter the new user's details from the Firm Administrator screen by selecting the Set up additional paraplanner button.

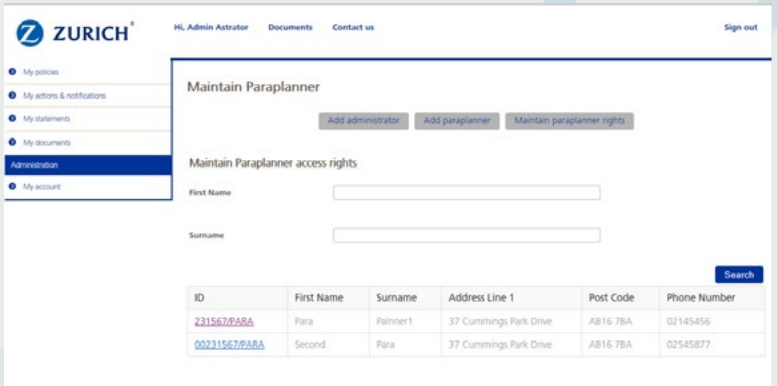
Paraplanners can either be assigned access to all advisers or restricted to one or more advisers depending on requirements.

Where a paraplanner is aligned to a specific adviser(s) they will only be able to act on behalf of those advisers.



Things to remember:

- The first administrator can set up one paraplanner as part of the firm registration process.
- A paraplanner cannot do anything (e.g. quote etc.) until there is an active adviser on the firm.
- All subsequent paraplanners must be set up by an existing administrator.
- There is no limit to the number of paraplanners that can be set up.



Adviser registration

Existing Registered users

Advisers who have previously registered for Zurich Services can log on using their current credentials (username and password or Unipass). When they try to access the Life Protection Platform for the first time, they will be asked to go through a set up process.

If you can't remember your current username, or you sign in with a Unipass certificate, you can contact eSupport for details on 0370 850 4419.

If you act as both an adviser and the firm administrator and have an existing Unipass ID we recommend that you use this for your adviser account.

New Users

Registering for Zurich Services	
Create your username (for more information, see Register for Zurich Services section, below)	Unipass

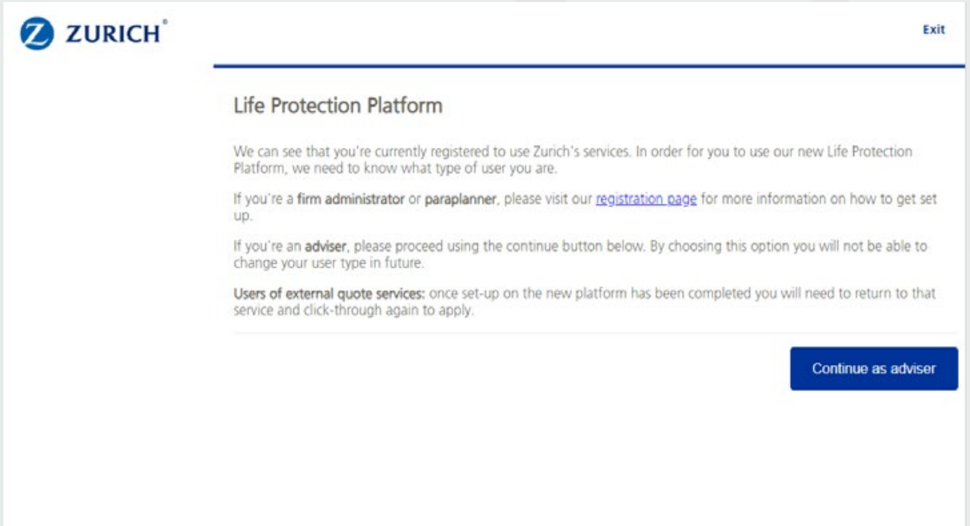
If you get an error message please click on the Unipass link to update your certificate.

Things to remember:

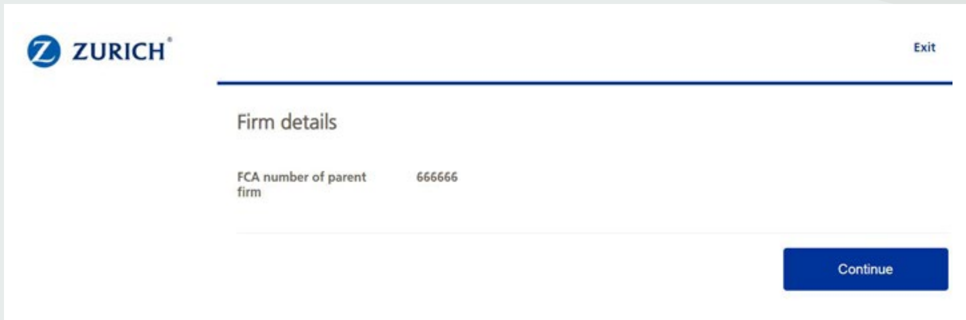
- It is not possible to quote on the platform without first being registered unless you are using a portal like Solution Builder.
- Advisers are restricted to working under one firm (by FCA number) per username. The same username cannot give access to multiple firms or users under a firm.
- When the adviser accesses the platform for the first time they will see the FCA number they've entered when setting up their account. This must be the FCA number for the firm they wish to submit business under. If the details in Zurich Services are incorrect, the adviser will need to re-register using the correct credentials.
- If the adviser works for an Appointed Representative firm they will need to provide us with the FCA number of the AR firm.
- Some details that the adviser has already provided when setting up their username or Unipass account will be pre-populated on the platform set up for ease of use.
- The adviser will be asked to sign up to the adviser portal terms of use as part of their registration.
- Once registration is complete, the adviser will land straight in the adviser portal and can start to quote and apply.

Registering advisers

1. When an adviser logs in, they will need to click on the Continue as adviser button.



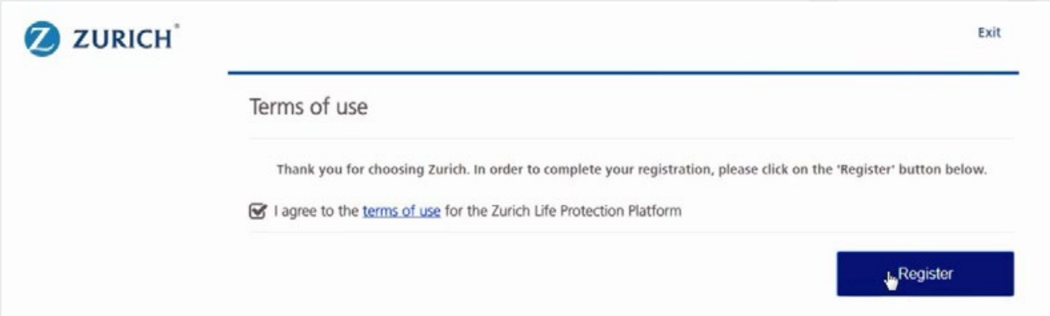
2. The adviser needs to confirm their firm's FCA number. This will be read-only for users already registered with Zurich Services. If the adviser works for an Appointed Representative firm, they'll need to enter their local FCA number.



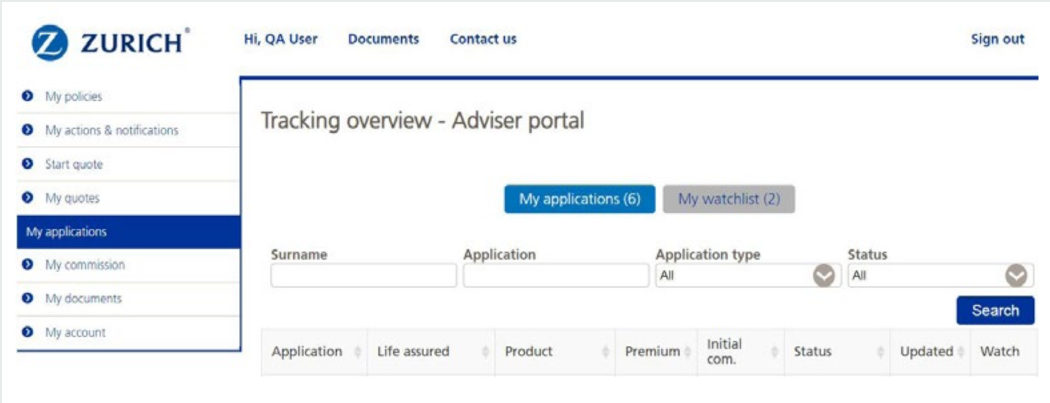
3. The adviser will need to provide their contact details. The default correspondence address will be the FCA registered address but the adviser can provide us with a different address.

4. The adviser will need to indicate their notification preference. We recommend that they select 'Yes' for all alerts. This can help advisers determine which notifications are of value to them. They can change the notification preferences at any time.

5. In order to complete the registration, the adviser will need to agree to the terms of use for the Life Protection Platform.



6. They can now access the portal and start a quote.



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We may record or monitor calls to improve our service.

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