

Life Protection Platform

Onboarding Guide





By registering or signing in you agree to the terms and conditions of this site.

☐ Remember me

Sign In with Username

OR

Sign In or Register with Unipass

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.

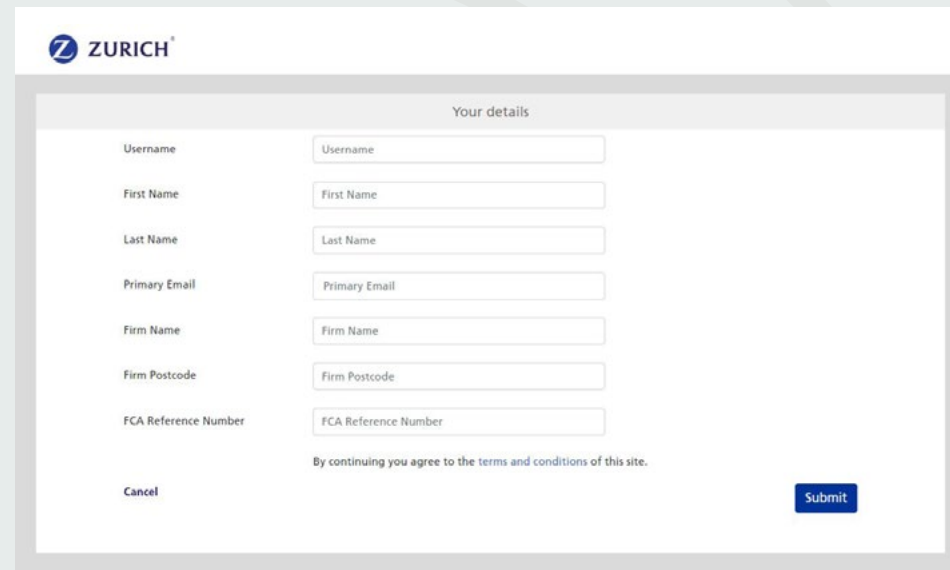
1. Your firm administrator will need to register for Zurich Services and create a username.
2. Once the Zurich Services registration is complete, you can proceed to set up the administrator and firm details on the platform.
3. We will complete the due diligence process and activate your firm's record.

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.



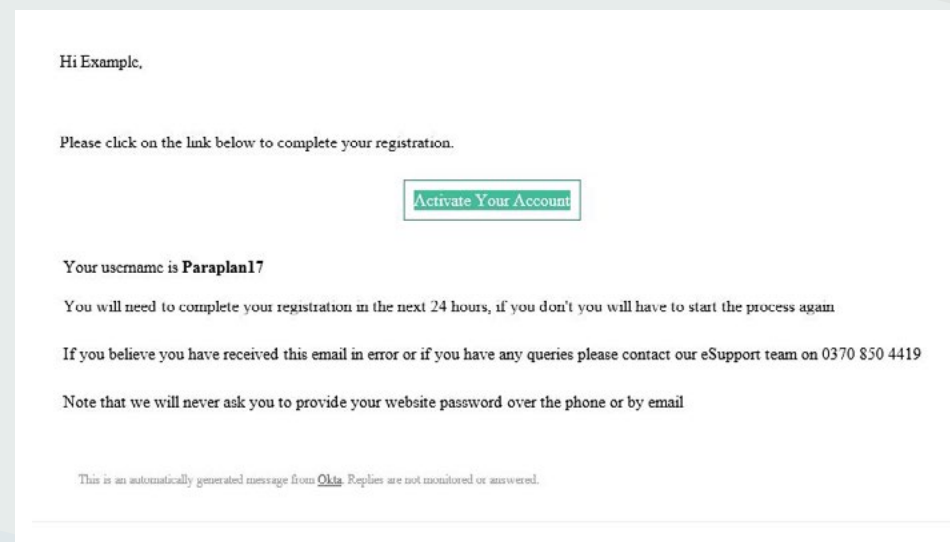
The screenshot shows a registration form for Zurich. At the top left is the Zurich logo. The form is titled "Your details" and contains several input fields: Username, First Name, Last Name, Primary Email, Firm Name, Firm Postcode, and FCA Reference Number. Each field has a corresponding label and a text input box. Below the fields, there is a "Cancel" button on the left and a "Submit" button on the right. A line of text between the buttons states: "By continuing you agree to the terms and conditions of this site."

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.

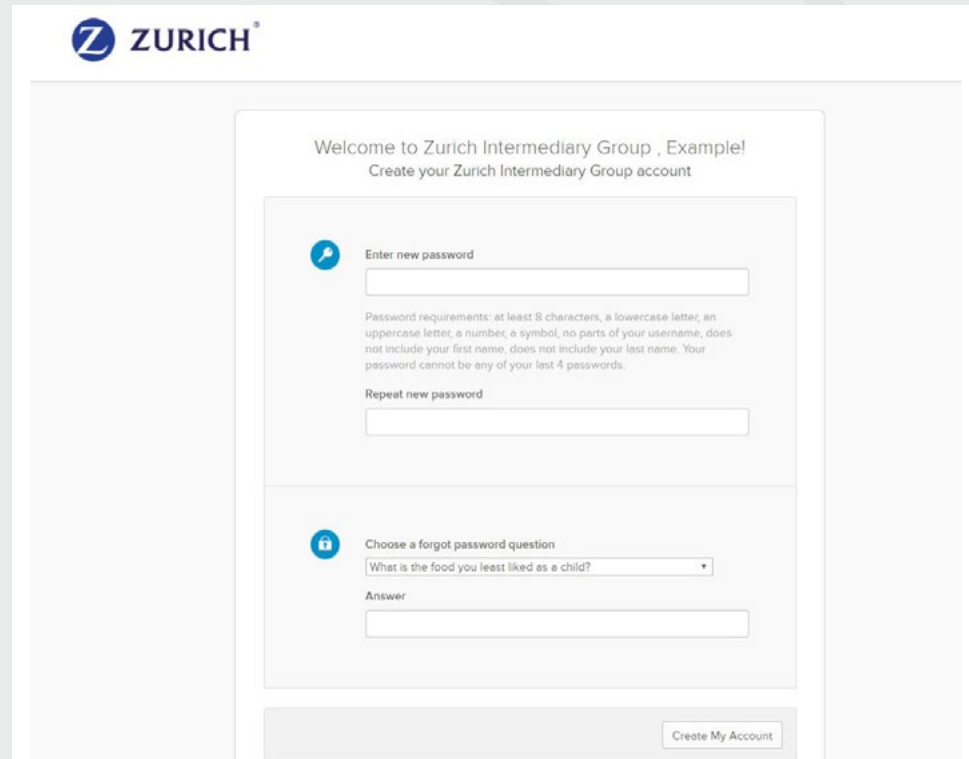


You don't need to double-click on the Activate Your Account button.



The screenshot shows an email invitation to complete registration. The email starts with "Hi Example," followed by the text "Please click on the link below to complete your registration." Below this text is a button labeled "Activate Your Account". The email then states "Your username is **Paraplan17**" and "You will need to complete your registration in the next 24 hours, if you don't you will have to start the process again". It also includes contact information for the eSupport team: "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". A note at the bottom says "Note that we will never ask you to provide your website password over the phone or by email". At the very bottom, a small line of text reads "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.



The screenshot shows a web page for creating a Zurich Intermediary Group account. At the top left is the Zurich logo, consisting of a blue circle with a white 'Z' and the word 'ZURICH' in blue capital letters. Below the logo, the page title reads 'Welcome to Zurich Intermediary Group , Example!' followed by 'Create your Zurich Intermediary Group account'. The main content area is divided into two sections. The first section, titled 'Enter new password' with a blue key icon, contains a password input field, a list of password requirements (at least 8 characters, a lowercase letter, an uppercase letter, a number, a symbol, no parts of your username, does not include your first name, does not include your last name, and your password cannot be any of your last 4 passwords), and a 'Repeat new password' input field. The second section, titled 'Choose a forgot password question' with a blue question mark icon, contains a dropdown menu with the text 'What is the food you least liked as a child?' and an 'Answer' input field. At the bottom right of the form is a button labeled 'Create My Account'.

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).



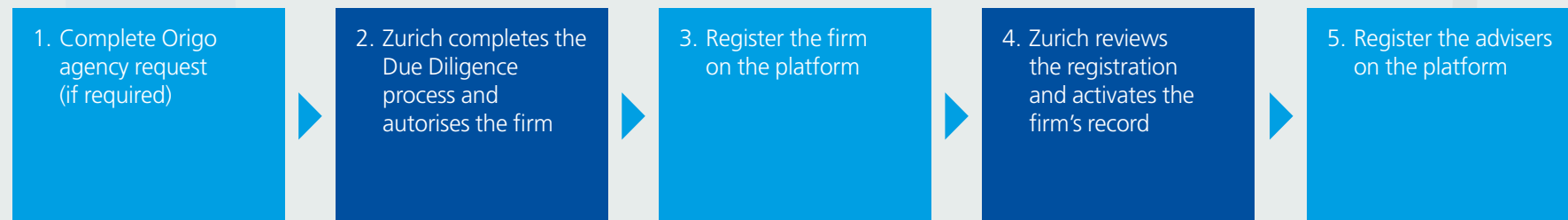
We recommend that you set up more than one administrator and give them paraplanner rights as well.

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.

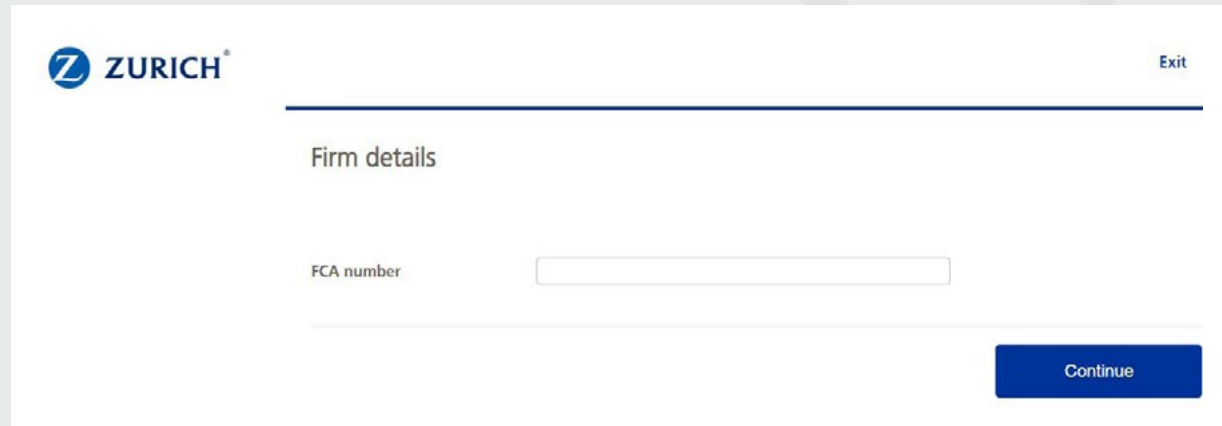


All five steps of the registration process must be completed before you can start using the platform. Please note that Step 5 cannot be completed until we have confirmed that your firm has been activated in Step 4.

Firm registration

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

a. Directly Authorised (DA) Firm



The form is titled 'Firm details' and features the Zurich logo in the top left corner. In the top right corner, there is an 'Exit' link. Below the title, there is a single input field labeled 'FCA number'. At the bottom right of the form, there is a blue 'Continue' button.

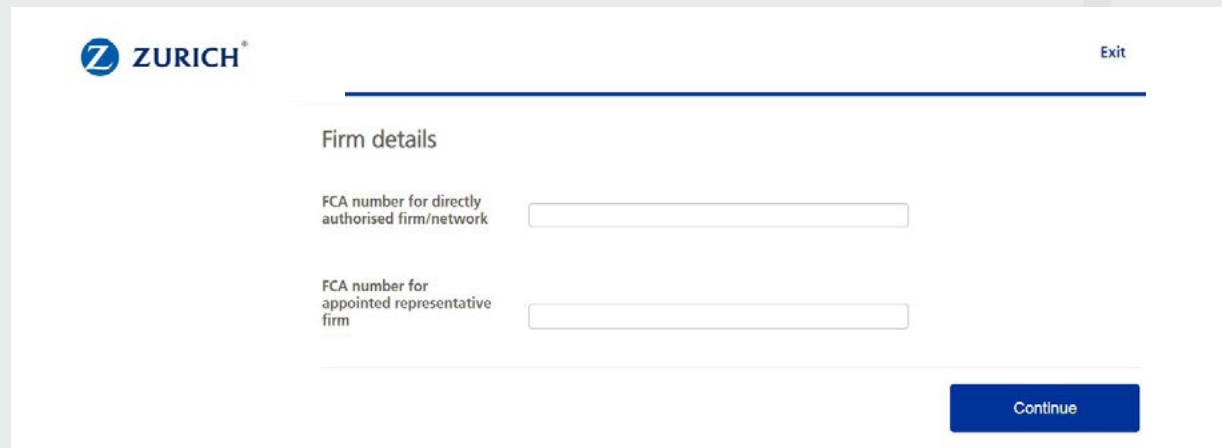
ZURICH® Exit

Firm details

FCA number

Continue

b. Appointed Representative (AR) Firm.



The form is titled 'Firm details' and features the Zurich logo in the top left corner. In the top right corner, there is an 'Exit' link. Below the title, there are two input fields. The first is labeled 'FCA number for directly authorised firm/network' and the second is labeled 'FCA number for appointed representative firm'. At the bottom right of the form, there is a blue 'Continue' button.

ZURICH® Exit

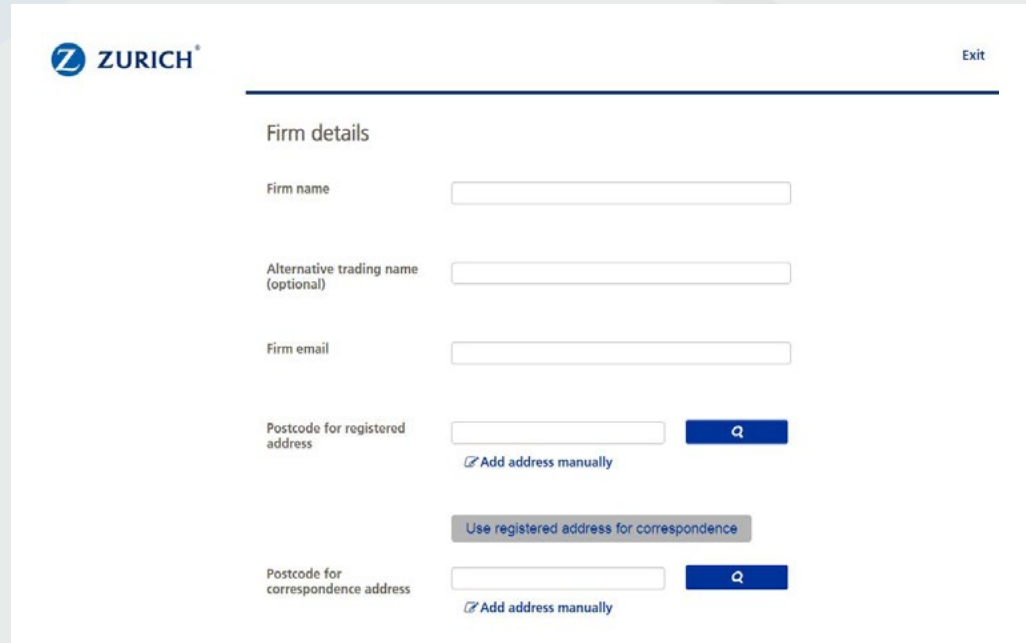
Firm details

FCA number for directly authorised firm/network

FCA number for appointed representative firm

Continue

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).



The screenshot shows a web form titled "Firm details" with the Zurich logo in the top left and an "Exit" link in the top right. The form contains several input fields and buttons:

- Firm name:** A single-line text input field.
- Alternative trading name (optional):** A single-line text input field.
- Firm email:** A single-line text input field.
- Postcode for registered address:** A single-line text input field followed by a blue button with a magnifying glass icon. Below this is a link that says "Add address manually".
- Use registered address for correspondence:** A grey button.
- Postcode for correspondence address:** A single-line text input field followed by a blue button with a magnifying glass icon. Below this is a link that says "Add address 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.

Commission payment

Payment frequency ☐ Weekly ☒ Monthly

Payment day

Address ☒ Registered Address ☐ Correspondence Address

Bank details

Account name

Account number

Sort code

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.

The screenshot shows the Zurich 'Set up Administrator' form. The header includes the Zurich logo, user information 'Hi, Another Admin', navigation links 'Documents' and 'Contact us', and a 'Sign out' link. A left sidebar contains a menu with items: 'My policies', 'My actions & notifications', 'My statements', 'My documents', 'Administration' (highlighted), and 'My account'. The main content area is titled 'Set up Administrator' and features three buttons: 'Add administrator' (active), 'Add paraplanner', and 'Maintain paraplanner rights'. Below these is the 'Administrator Details' section with input fields for 'First name', 'Surname', 'Zurich Services username' (with a 'register here' link), 'Email', 'Contact number', and 'Fax'. There is also a 'Postcode for correspondence address' field with a 'Find Address' button and a link to 'Add address manually'. An unchecked checkbox for 'Include paraplanner rights' is at the bottom. An 'Update' button is located at the bottom right of the form.

ZURICH Hi, Another Admin Documents Contact us Sign out

My policies
My actions & notifications
My statements
My documents
Administration
My account

Set up Administrator

Add administrator Add paraplanner Maintain paraplanner rights

Administrator Details

First name

Surname

Zurich Services username
If you don't have a Zurich Services username, or wish to know more, then [register here](#)

Email

Contact number

Fax

Postcode for correspondence address Find Address
[Add address manually](#)

☐ Include paraplanner rights

Update

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

Terms of business

Thank you for choosing Zurich. In order to complete your registration, please click on the 'Register' button below.

If you are a directly authorised firm and have not previously established a relationship with Zurich, you will also need to complete our [online agency application](#) hosted by Origo Services Ltd. By registering you will agree to our [terms of business](#).

☐ I confirm that the firm administrator and any paraplanner setup here have agreed to the terms of use for the Zurich Life Protection Platform.

Register

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.

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.

New users

Registering for Zurich Services

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

[Unipass](#)

Include paraplanner rights ☒ Yes ☐ No

Set up additional paraplanner ☒ Yes ☐ No

Paraplanner details

First name

Surname

Email

Zurich Services username

If you don't have a Zurich Services username, or wish to know more, then [register here](#).

Please note: Unipass users will still have a Protection Hub username. If you do not know your current username, information on how to retrieve it can be found [here](#).

Contact number

Fax (optional)

ZURICH Hi, Admin Astrator Documents Contact us Sign out

My policies
My actions & notifications
My statements
My documents
Administration
My account

Maintain Paraplanner

Add administrator Add paraplanner Maintain paraplanner rights

Maintain Paraplanner access rights

First Name

Surname

ID	First Name	Surname	Address Line 1	Post Code	Phone Number
231567PABA	Para	Palmer1	37 Cummings Park Drive	AB16 7BA	02145456
00231567PABA	Second	Para	37 Cummings Park Drive	AB16 7BA	02545877

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](#)

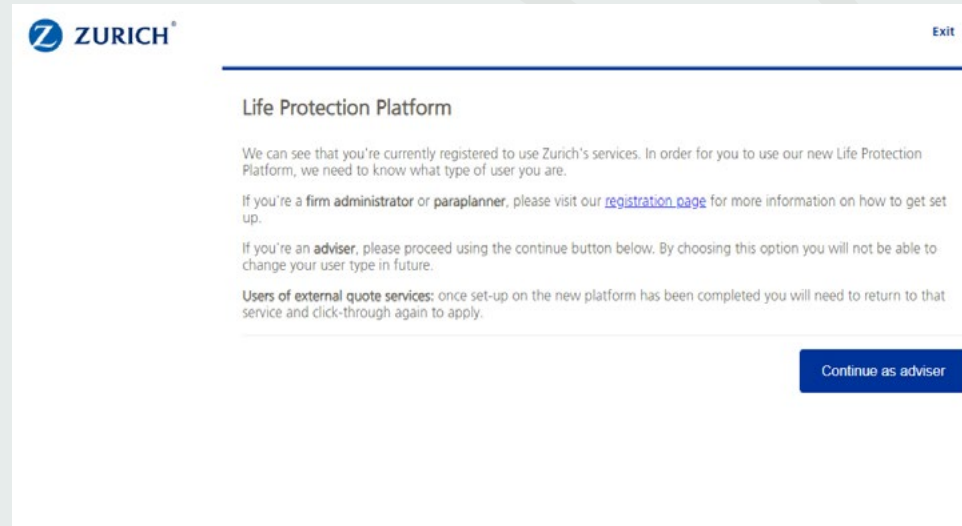
If you get an error message please click on the Unipass link to update your certificate.

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.

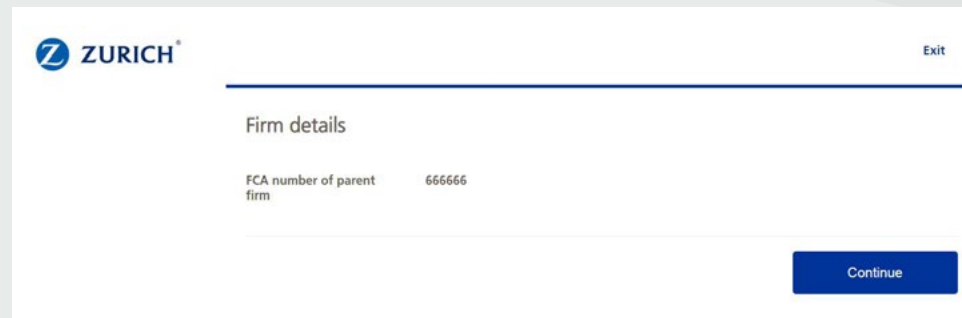
Registering advisers

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



The screenshot shows the Zurich Life Protection Platform registration page. At the top left is the Zurich logo, and at the top right is an 'Exit' link. The main heading is 'Life Protection Platform'. Below this, a paragraph states: 'We can see that you're currently registered to use Zurich's services. In order for you to use our new Life Protection Platform, we need to know what type of user you are.' This is followed by two paragraphs: 'If you're a firm administrator or paraplanner, please visit our [registration page](#) for more information on how to get set up.' and 'If you're an adviser, please proceed using the continue button below. By choosing this option you will not be able to change your user type in future.' A third paragraph reads: 'Users of external quote services: once set-up on the new platform has been completed you will need to return to that service and click-through again to apply.' At the bottom right, there is a blue button labeled 'Continue as adviser'.

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.



The screenshot shows the Zurich Life Protection Platform firm details page. At the top left is the Zurich logo, and at the top right is an 'Exit' link. The main heading is 'Firm details'. Below this, there is a label 'FCA number of parent firm' followed by the value '666666'. At the bottom right, there is a blue button labeled 'Continue'.

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.

The screenshot shows the Zurich Life Protection Platform registration page. At the top left is the Zurich logo. At the top right is an 'Exit' link. Below the logo is the heading 'Terms of use'. A message states: 'Thank you for choosing Zurich. In order to complete your registration, please click on the "Register" button below.' Below this is a checkbox labeled 'I agree to the [terms of use](#) for the Zurich Life Protection Platform'. At the bottom right is a blue 'Register' button with a mouse cursor icon.

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

The screenshot shows the Zurich Adviser portal. At the top left is the Zurich logo. To its right are links for 'Hi, QA User', 'Documents', and 'Contact us'. At the top right is a 'Sign out' link. On the left is a sidebar menu with the following items: 'My policies', 'My actions & notifications', 'Start quote', 'My quotes', 'My applications' (highlighted in blue), 'My commission', 'My documents', and 'My account'. The main content area is titled 'Tracking overview - Adviser portal'. It features two buttons: 'My applications (6)' and 'My watchlist (2)'. Below these are search filters: 'Surname', 'Application', 'Application type' (set to 'All'), and 'Status' (set to 'All'). A 'Search' button is to the right of the filters. At the bottom is a table with the following headers: 'Application', 'Life assured', 'Product', 'Premium', 'Initial com.', 'Status', 'Updated', and 'Watch'.

For intermediary use only – not for use with your clients.

Zurich Assurance Ltd.

Registered in England and Wales under company number 02456671.

Registered Office: Unity Place, 1 Carfax Close, Swindon, SN1 1AP.

We may record or monitor calls to improve our service.