

My Resolution Life

How to Guide

Certificate of Currency

*A step by step guide to accessing
customer certificate of currency*

Resolution Life

Access Certificate of Currency

(Page 1 of 3)

Log in and [access Customer view](#). From the dashboard menu on the left of the screen:

Step 1

- Select **[Request]**

Step 2

- Select **[Certificate of Currency]**
- Complete required information.
- *Once processed a copy will be available*

The screenshot shows the Resolution Life customer dashboard. At the top, the Resolution Life logo is displayed. Below the logo, there is a navigation bar with a notification bell icon indicating 'you have 0 new notifications'. To the right of the notification, the user's profile information is shown: Name: John Smith, Contact number: +61, and Residential address: 400 GEORGE ST SYDNEY NSW.

The main content area is titled 'Business Insurance Plan'. On the left side, there are two buttons: 'TFN Validation' and 'Fund Validation'. Below these buttons is a section labeled 'I want to:' with a 'Staff View' button. A dropdown menu is open, showing 'Request' (highlighted with a red box and a yellow circle with the number 1) and 'Certificate of Currency' (highlighted with a red box and a yellow circle with the number 2). Below the dropdown menu, there are several options: 'a quote/illustration', 'a quote/illustration - reduction quote', 'a change of table illustration', and 'a paid up quote illustration'.

The main content area displays 'Product Details' for a 'Business Insurance Plan'. The policy number is H2002174-K. The TFN status is N. The plan started on 01/01/1992 and ends on 10/02/2063. Below the product details, there are two columns of information for the policyholders: John Smith and Mary Smith. John Smith is the Owner, with an Other relationship and an Owner date of birth of 01/01/1960. Mary Smith is also the Owner, with an Other relationship and an Owner date of birth of -.

On the right side of the dashboard, there is a search bar and a 'Customer Resource centre' section with a 'Click here' button.

Access Certificate of Currency

(Page 1 of 3)

From the dashboard menu on the left of the screen:

Step 3

- Select [View]
- Select [View my statements and correspondence]

The screenshot displays the Resolution Life user interface. At the top, there is a search bar and user information including 'ZDCRCE TLEN' and a 'Log out' button. The main header shows the user's name 'Dbnl Mfim' and contact number '+61 0418372344'. Below the header, a navigation bar indicates the current view is 'Adviser View' for 'Resolution Life Insurance'. A left-hand menu contains several options: 'Request', 'Find', 'Make', 'Provide', 'Apply', 'Update', and 'View'. The 'View' option is highlighted with a red box and a yellow circle containing the number '3'. Below the menu, there are sections for 'notifications' and 'view my statements and correspondence'. The main content area displays 'Product Details' for 'Policy Data As At: 05/10/2022'. It includes fields for 'Member number' (D311117967), 'Plan started' (19 Apr 1998), 'Plan ends' (19 Apr 2025), and 'Premium indexed with inflation' (Y). Below this, there are two columns of information: 'Icovgp Gfoghjih Hotifmlomgvbl Avsvgiu' (Relationship type: Owner) and 'Dbnl Mfim' (Relationship type: Owner-Life Insured, Insured DOB: 20 Apr 1960). Further down, there are sections for 'Mailing address' (6 Zabkifaim Uf, KILSYTH SOUTH, VIC 3137 Australia), 'Insurance benefit start date' (19 Apr 1998), 'Insurance benefit end date' (19 Apr 2025), and 'Policy anniversary' (19 Apr 2023). At the bottom, there are expandable sections for 'Transaction Details', 'Insurance details', 'Payments, Premiums and Fees', 'Payment Details', and 'Financial Adviser details'.

Access Certificate of Currency

(Page 1 of 3)

Step 4

- Select [**New Statements & Correspondence**]
- Find Certificate of Currency from the list and select [**Download**]

The screenshot shows the Resolution Life dashboard. At the top, there is a search bar and user information. The main content area is titled 'Notifications' and contains three notification cards: 'My Alerts', 'New Statements & Correspondence' (highlighted with a red box and a yellow circle with the number 4), and 'General Notifications'. Below the notifications is a section for 'Statements & correspondence' with filters for 'Document Type' and 'Period'. A table lists various documents, with the 'Certificate of Currency' entry highlighted by a red box. The table includes columns for Date, Correspondence Type, Policy Number, Product Name, and Action (Download).

Date	Correspondence Type	Policy Number	Product Name	Action
16/11/2022	Significant Event Notification - Member	D31117667	Resolution Life Insurance	Download
14/11/2022	Certificate of Currency	D31117667	Resolution Life Insurance	Download
05/09/2022	Member Statement	D302558408	Resolution Life Insurance	Download
08/07/2022	Benefit Schedule	D31117675	Resolution Life Insurance	Download
08/07/2022	Benefit Schedule	D31117675	Resolution Life Insurance	Download

Thank you

What you need to know

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