

# **My Resolution Life adviser portal How to guide: EasyQuote**

*A guide for using the EasyQuote tool within  
the NZ Adviser portal*

# EasyQuote via My Resolution Life adviser portal

EasyQuote can be used for quotes in these products:

- Risk Protection Plan (RPP)
- Lifetrack
- Conventional
- QuickStart (from 15 May).

**This user guide is for RPP, Lifetrack, and QuickStart quotes.**

The EasyQuote tool is a one stop shop to provide you with:

- simplified insurance policy reporting
- seamless functionality (no need to refresh annually)
- easy access to policy documents, product cards and application forms.

To get started, you'll need to gather your client's details ie name, date of birth, gender and smoking status.

If you need assistance with the above or Conventional quotes, please contact [tapin.risk@resolutionlife.co.nz](mailto:tapin.risk@resolutionlife.co.nz).



# Generate a quote

# Generate a new quote

## Step 1 – Log in to My Resolution Life

- Access your profile by logging in to the My Resolution Life portal.

## Step 2 – Navigate to Quotes

- From the left-hand menu, select **Quotes**.
- In the drop-down menu, choose **EasyQuote (NZ)**.

1 **Adviser/Licensee Login**

Username


Password


☐ Remember me [Set/Forget your password?](#)

**Log in**

2 **Quotes** ^

Existing policy  
Elevate Online (AU)  
**EasyQuote (NZ)**  
MyQuote annuities

 Documents & Forms v

 Statements and correspondence v

# Generate a new quote

## Step 3 – Start a new quote

- Select **Start a new quote** from the **Quote request** page
- To proceed select **Next**.

## Step 4 – Enter your details (adviser)

- Enter your **First name** and **Last name**. You have the option to also add your **Practice name**.
- Select your client's **Product**.
- To proceed then select **Next**.

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### Quote request

What would you like to do today?

☒ Start a new quote

☐ Retrieve an existing quote

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Next >

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### Quote request

Enter adviser details \*

First name \*

Last name \*

Practice name

Select product type \*

☒ Lifetrack

☐ Risk Protection Plan

☐ QuickSL<sup>®</sup>

☐ Conventional

< Back

Next >

# Generate a new quote

## Step 5 – Enter your client's life insured details

- Enter their **First name**, **Last name**, **Date of Birth** and **Gender**.
- Advise whether your client is a smoker by selecting the correct response, **Yes or No**.

## Step 6 – Confirm your client's occupation

- The customer occupation section appears as you complete your client details. Previously you didn't always need to do this, but it's now required.
- Either select
  - **View all** to scroll through the list of occupations (using the light grey bar to the right) or
  - **Type** the occupation in the text field.
- Please be specific when selecting occupation.
- To proceed select **Next**.

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### Enter life insured details

First name \* Last name \*

First name Last name

Date of birth \* Age \*

dd/mm/yyyy

Gender \*

☐ Male ☐ Female

Is the customer a smoker? \*

☐ No ☐ Yes

6

Customer occupation \* View all

Start typing to search

< Back Next >

Related	Code
Abalone Diver (Paua)	H
Abattoir - Supervisor (no manual work)	3

# Generating a quote

## Step 7 – Configure your client's plan

- You'll then be directed to the **configure plan** menu.
- Select your client's **cover type** and **cover option**. The options will change and may look different to the image depending on the product and cover selected.
- You'll be able to see your client's summary in the bottom right side of the page.
- Enter your client's **Sum insured**.
- You'll then be able to select **indexation**, **review time**, **linked options** and **optional benefits** (applicable options will appear).

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### Configure plan

Select a standalone plan to configure. Linked options can be configured from within standalone plans.

Life	TPD	Trauma	Income Protection
Children's Cover	Home Loan Cover	Business Cover	

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Select a cover option.

Life Cover	Life2Go	Level Life Cover
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Example only

Life Cover

Sum insured\$100,000Premium\$17.02 / month

Life Insured

John Doe

Indexation

NIL

CPI

CPI 5

Premium review

1 year

Optional Benefits

☐ Premium Cover

Linked Options

☐ Future Life Cover (Business Purpose Only)  
☐ Linked Disability Cover  
☐ Future Disability Cover (Business Purpose Only)  
☒ Linked Trauma Cover

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Ok >

Life Insured

John Doe

Add another life insured

Payment frequency

Monthly

Effective date

13/05/2025

Life Insured

John Doe

Life Cover

Sum insured\$100,000.00

Premium\$17.02

Total premium\$17.02 / month

Summary

John Doe

\$17.02 / month

Total Premiums\$17.02 / month  
\$204.24 / annualised

# Generating a quote

## Step 7 cont... – Configure your client's plan

- Once you're ok with the selection, click on **Ok**. Your cover details will then be hidden, but the premium details will still be visible.
- You can then select a new cover type if required.
- You can now also select any applicable discounts or loadings.
- If you want to revisit the cover details after you've selected OK, you can click on the cover type heading in the premium section.
- Depending on the product, you can also **Add another life insured**.
- Click on **Save** if you'd like to save on portal to view again.
- You can then review your quote by selecting **Reports**.

7 Example only

**Life Cover**

Sum insured: \$100,000 Premium: \$17.02 / month

Life Insured: John Doe

Indexation: ☐ Nil ☒ CPI ☐ CPI 5

Premium review: 1 year

Optional Benefits: ☐ Premium Cover

Linked Options: ☐ Future Life Cover (Business Purpose Only) ☐ Linked Disability Cover ☒ Future Disability Cover (Business Purpose Only) ☐ Linked Trauma Cover

< Back Ok >

Life insured: John Doe

Add another life insured

Payment frequency: Monthly

Effective date: 13/05/2025

Life insured: John Doe

Life Cover: ☒ x

Sum insured: \$100,000.00

Premium: \$17.02

Total premium: \$17.02 / month

Summary

John Doe: \$17.02 / month

Total Premiums: \$17.02 / month \$204.24 / annualised

Save Reports



# Generate a new quote

## Step 8 – To view your quote

- There are different reports available. Each report needs to be selected individually.
- Select the **Quote report type** then click on **Export**.
- You can then name and save your quote.

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**Export Report** ×

Please select what to include in the quote report:

☐ Product details

☐ Premium projections - Product breakdown

☐ Premium projections - Total policy

File name \*

Lifetrack Report - John Doe

Export

# The application process

# Application process

- After saving your quote, review it with your client.
- Once the quote has been reviewed and approved by your client, all policyholders will need to sign and date the quote or complete an Alteration Form.
- Note for:
  - **Reductions:** You can use the signed and dated quote or Alteration form.
  - **Increases or adding a new product or benefit:** your client needs to complete a full Application and Personal Statement Form.
  - **Continuation Option:** your client needs to complete the relevant Continuation Option Application Form.
- You can submit the request through My Resolution Life adviser portal or email to [askus@resolutionlife.co.nz](mailto:askus@resolutionlife.co.nz).

## Lifetrack illustration

### Product details

#### Client details

John Doe  
Date of birth 01/01/2000  
Gender Male  
Smoker Non-smoker  
Occupation Accountant - Other  
Occupation rating 2A

### Summary

Life Insured	Plan details	Sum insured	Cease age	Monthly Premium
John Doe	Life Cover	\$100,000.00	101	\$17.02
				John Doe Total \$17.02
Total policy monthly premium				\$17.02
Total policy annualised premium				\$204.24

**Sign and date**

# What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, NZ Company No. 281363, AFSL No. 233671 (Resolution Life) is the issuer of this user guide.

The content on this user guide is for information only. This information provides a general summary of the key features of Resolution Life's EasyQuote tool. The information contained in this user guide is factual information only and it does not contain any financial product advice or opinion or any recommendation about any financial product or service being right for you or our mutual customers. This information is not intended to represent or be a substitute for professional financial or tax advice.

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If you have any questions or require any further information, please contact us on 0800 808 267 or email us at [AskUs@resolutionlife.co.nz](mailto:AskUs@resolutionlife.co.nz).