My Resolution Life adviser portal
How to guide: EasyQuote

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

Resolution Life

EasyQuote via My Resolution Life adviser portal

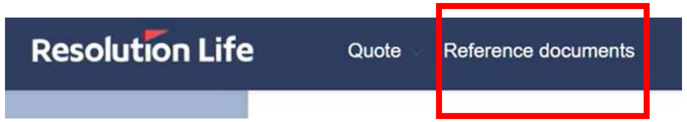
EasyQuote can be used for quotes in these products:

- 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.

Generate a quote

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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)**.

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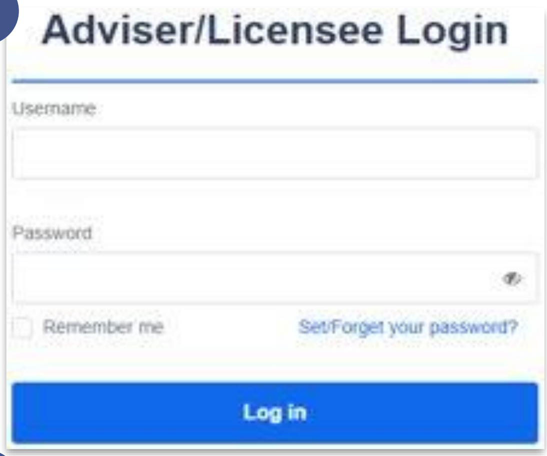

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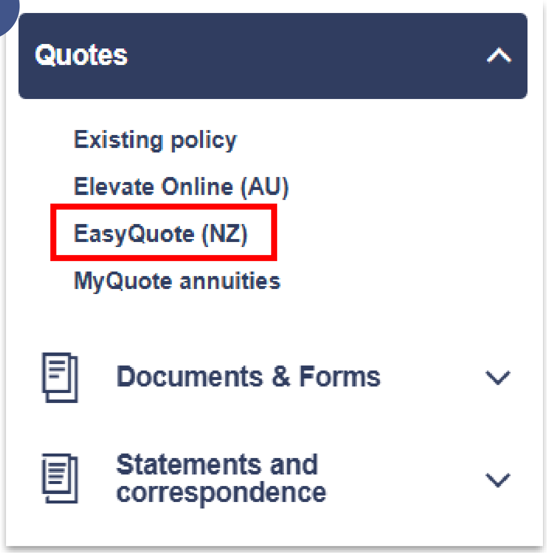


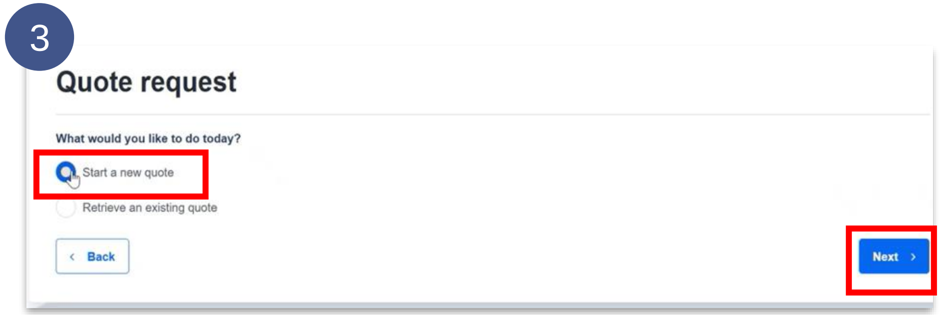
Generate a new quote

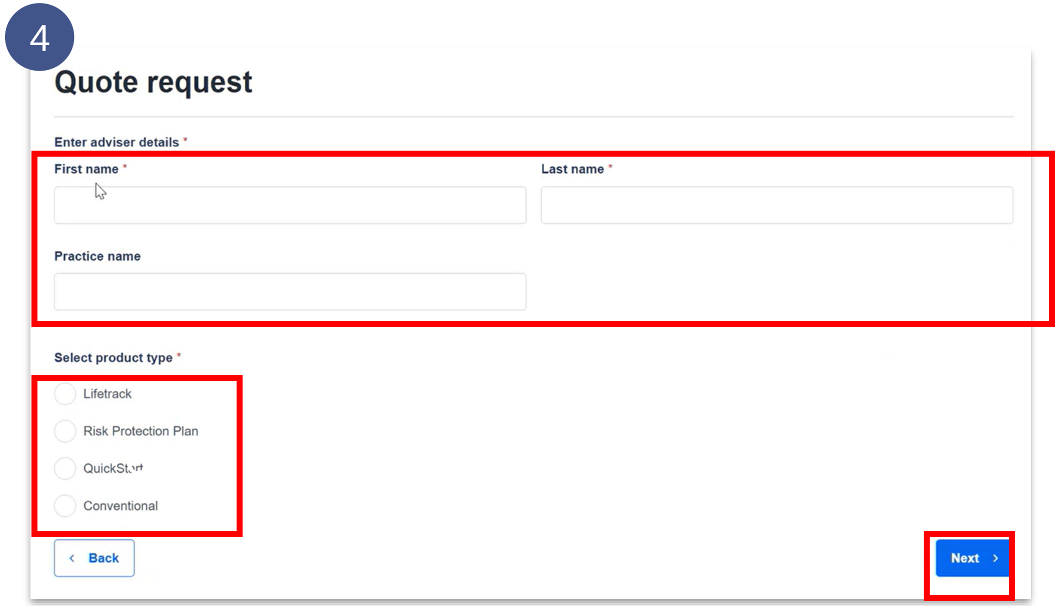
Step 3 – Start a new quote

- 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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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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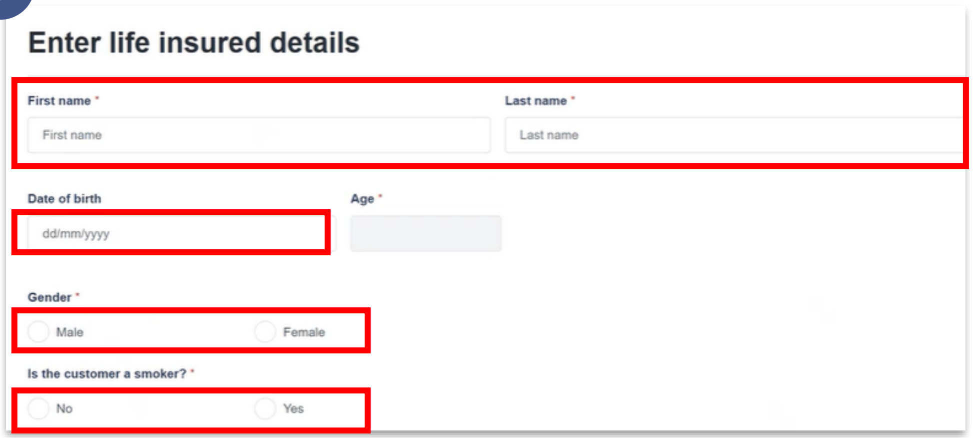

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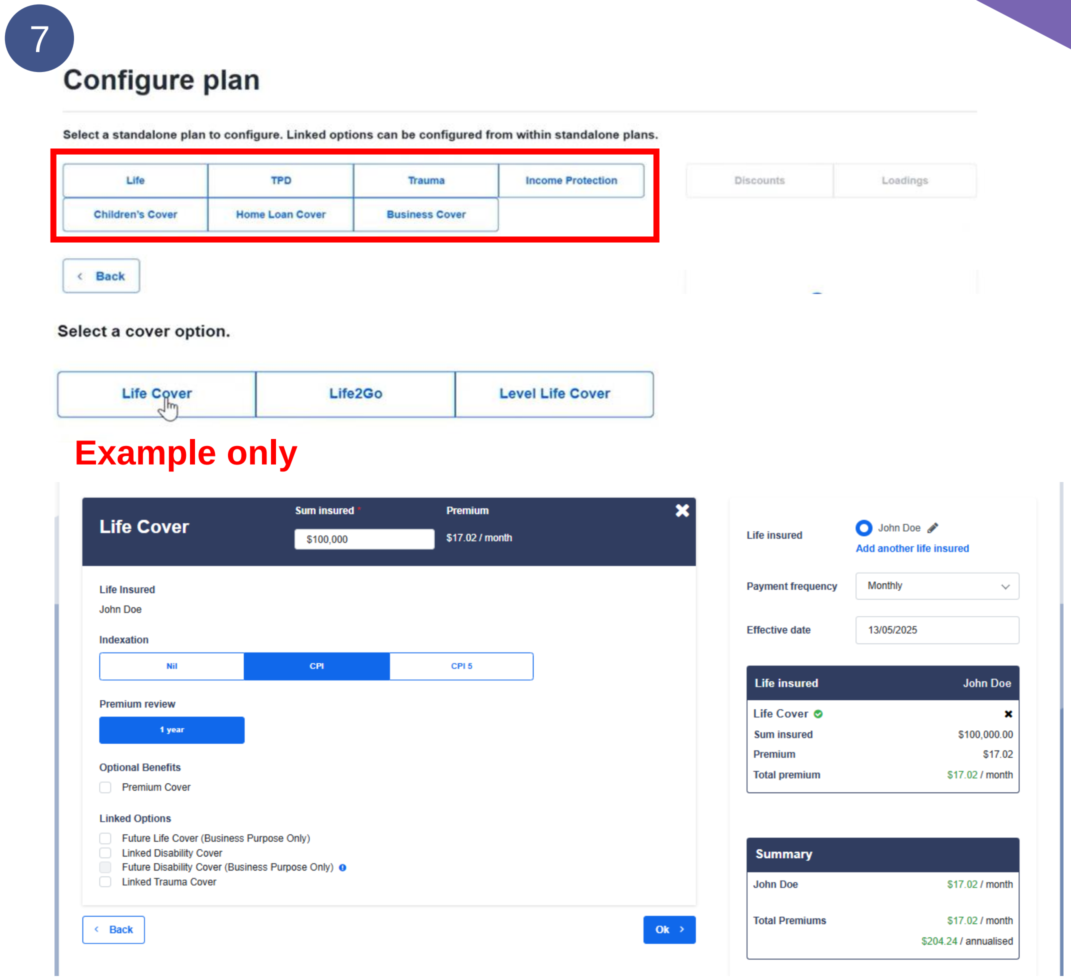
Generating a quote

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)**.



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.**

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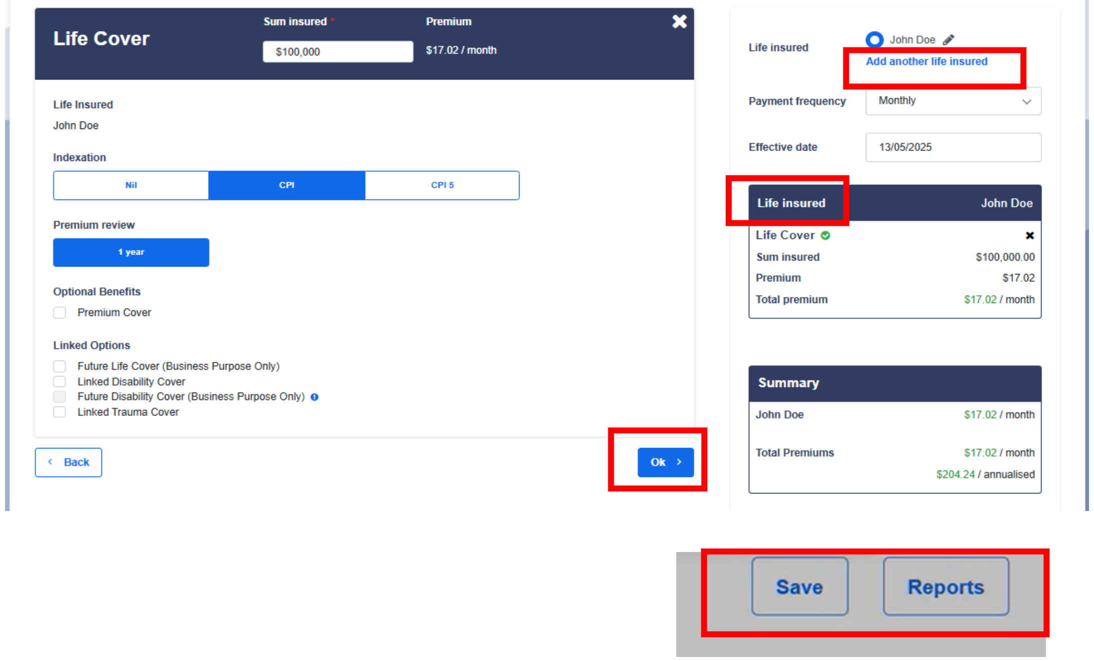
Example only



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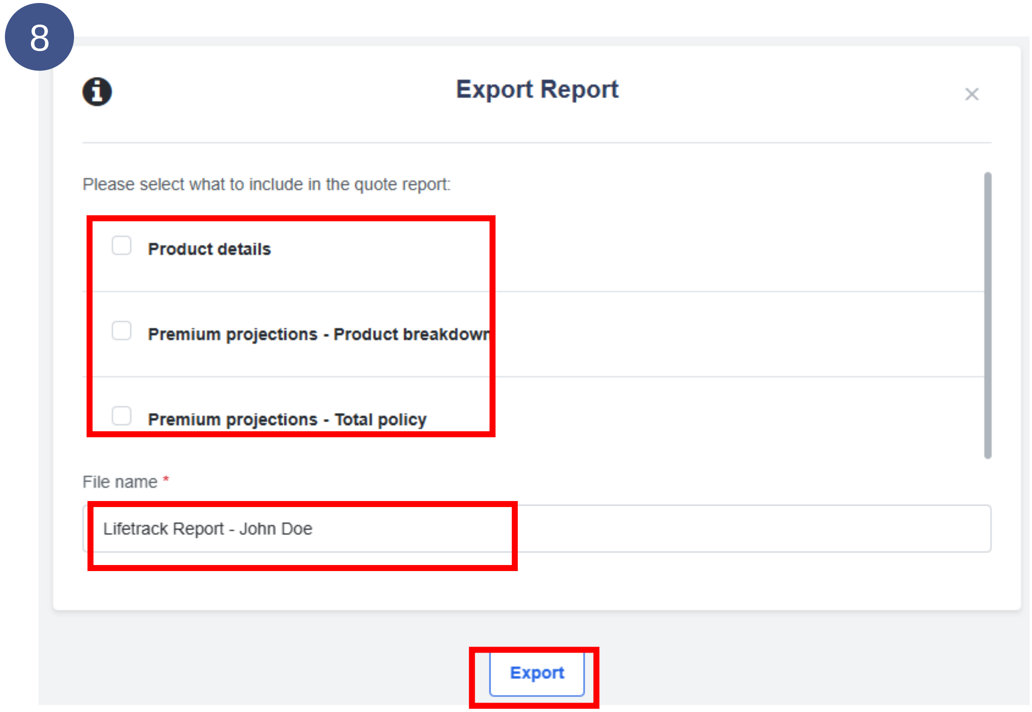
Step 8 – To view your quote

- 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.



The application process

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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.

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Prepared by: John Doe
Effective date: 13/05/2025
Date of quote: 13/05/2025

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

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What you need to know

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.

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