



Macquarie LifeConnect: it's your choice

Your client's Personal Statement is an integral part of their application for insurance with Macquarie Life. Macquarie Life now offers you and your clients a choice of three approaches for completing the Personal Statement questionnaire.

Macquarie Life TeleConnect	Macquarie Life WebConnect	Adviser
<ul style="list-style-type: none">■ You set up the application online and submit it on your client's behalf, with referral to our tele-interviewing service for completion of the personal statement■ After booking in an appointment, one of our tele-interviewers guides your client through the personal statement over the phone to complete the application	<ul style="list-style-type: none">■ You refer your client to our secure portal, where the client is then able to complete the personal statement online, at their convenience, within the next seven days■ Once the client has completed the personal statement, you are notified by email and are then able to review and submit the application on your client's behalf	<ul style="list-style-type: none">■ You complete the personal statement online with your client■ Once all application details are completed, you submit the application on your client's behalf

It's your choice in terms of which of these approaches best suits you and each of your clients. TeleConnect and WebConnect provide secure alternatives for the collection of information required to complete the personal statement.

Once you have commenced the application in Macquarie Life's secure online portal, you will be able to nominate the preferred approach to completion of the personal statement.

The Macquarie LifeConnect experience

Why use Macquarie Life TeleConnect?

Macquarie Life TeleConnect offers:

1. Access to trained tele-interviewers

Macquarie Life TeleConnect refers your client to our trained tele-interviewers, who will capture all information required to complete your client's personal statement by interviewing your client over the telephone. You can rest assured that our tele-interviewers are trained to collect your client's personal statement information in a sensitive, confidential and professional manner.

2. Choice of Interview day and time

When you select Macquarie Life TeleConnect, we will contact your client and book in a time for their tele-interview. Note that our TeleConnect service operates from Monday to Fridays from 8am to 8pm (AEST).

3. A complete record of your client's disclosure

Calls between your client and our tele-interviewers are recorded to provide an objective record of disclosure, which can then help to minimise disputes at claim time.

4. A streamlined application process

Once the tele-interview has been completed, the application will be referred to underwriting for assessment. We will let you know how your client's application is progressing by email. As Macquarie Life TeleConnect is integrated with Macquarie Life's online adviser dashboard, you can see the status of your client's application through the status reports available as part of the Work In Progress (WIP) tracking system.

When you nominate TeleConnect as the preferred option for completing your client's personal statement, we will arrange the tele-interview directly with your client. If we are unable to contact your client to book their appointment or conduct the tele-interview, we will let you know. If, after several attempts we have not been able to contact your client, we will provide you with the option to make other arrangement with your client for the completion of the personal statement.

Why use Macquarie Life WebConnect?

Macquarie Life WebConnect offers:

1. Convenience

Your client has seven days to complete the personal statement and can choose when it is most convenient for them to do so. Your client has the option to complete their personal statement in a single session, or they can save their work in progress and complete their personal statement over more than one session, as preferred.

2. Security and Confidentiality

Clients who complete their personal statement using Macquarie Life WebConnect are provided with a unique user id and password, which grants them temporary access of up to seven days to our secure online portal. The client's user id is provided to the client's email address, which you nominate after you select "Macquarie Life WebConnect" as the preferred option for your client to complete their personal statement. At this stage, you are also asked to nominate the client's mobile telephone number, as the client's password is provided via SMS to that number.

3. Visibility and Control

Once the client has completed their personal statement through the online service, you will receive email notification that the personal statement has been completed. At this stage, responsibility for final review and submission of the application rests with you, as the client's nominated agent. We will then provide status updates via email. The progress of the application can also be tracked through the status reports available as part of the Work In Progress (WIP) tracking system within the Macquarie Life online adviser dashboard.

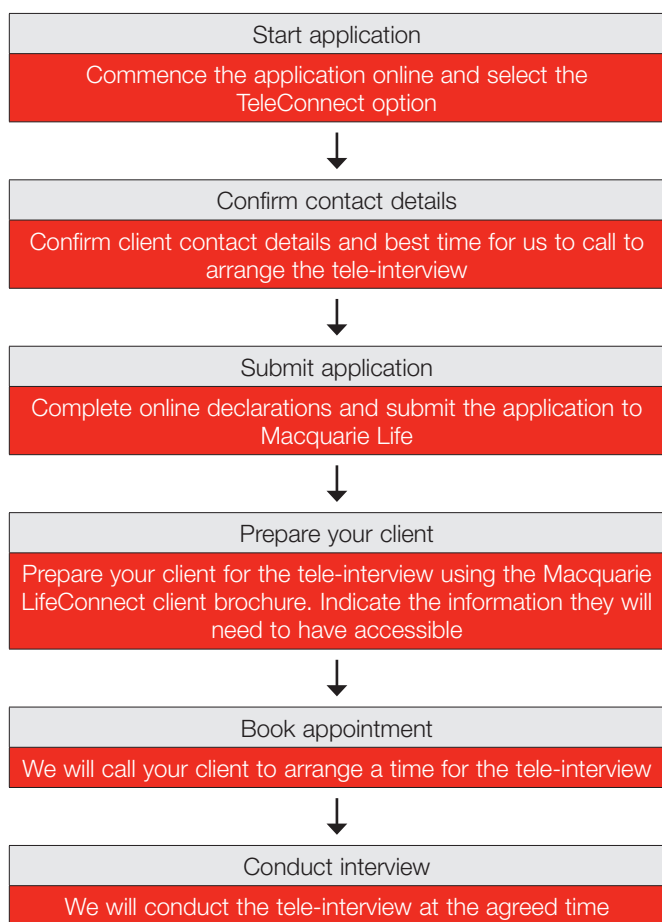
Should your client not complete their personal statement within the seven day period, you can follow up the client directly to determine how to best proceed to finalise the application.

You also have the ability to recall the application from your client at any time if necessary, and to resend email links and reset password if your client requires this.

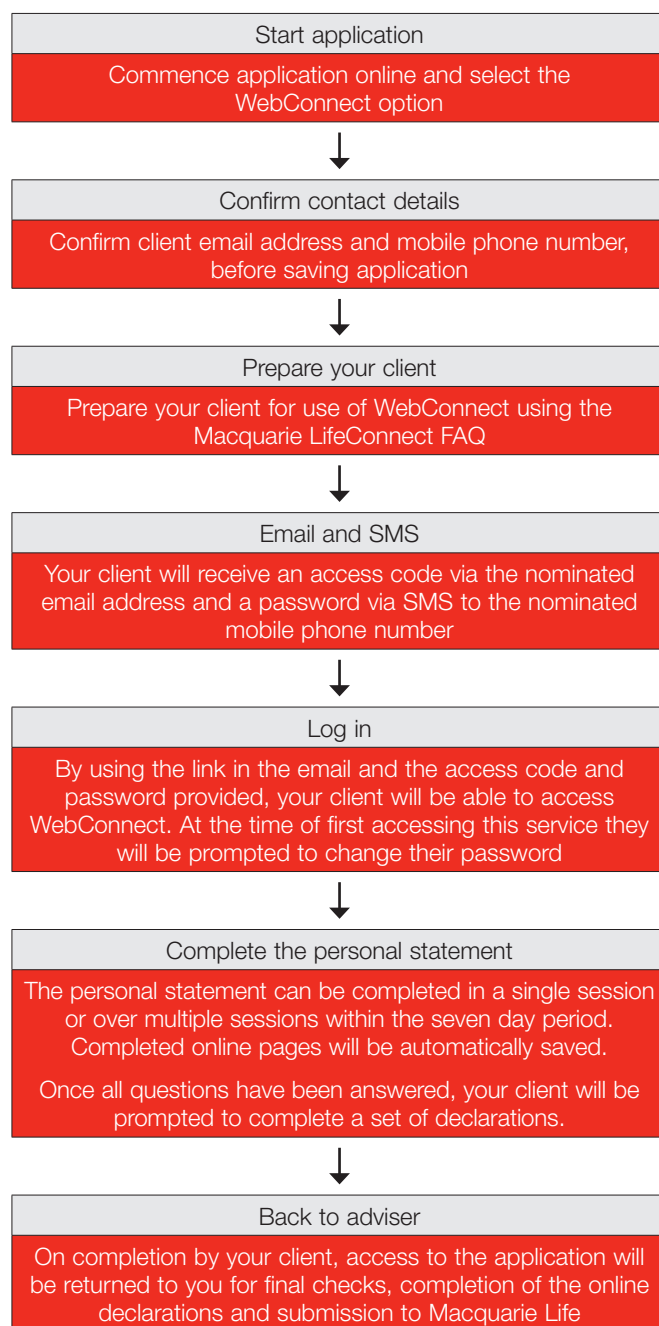
Lets walk through the process of TeleConnect and WebConnect



TeleConnect



WebConnect



Once the application has been submitted, Macquarie Life's standard underwriting processes apply.

The Macquarie LifeConnect experience



The personal statement requires your client to answer a series of questions around health and lifestyle related factors. Information required includes:

Information	Details
Family medical history	details of your immediate family (mother, father, brothers and/or sisters) medical history such as whether they were diagnosed with coronary problems, cancer, diabetes or any hereditary conditions
Measurements	current height and weight and details of any recent change
Medical history	details of any past and present medical conditions, including: <ul style="list-style-type: none"> ■ dates and details of diagnosis ■ treatments provided and/or medications prescribed, including dosages and durations of treatment and details of any hospital stays. ■ results of any tests including blood pressure and cholesterol readings. ■ contact details of your medical practitioner(s)
Children's medical history	if applying for Child Trauma Insurance

For more information on **Macquarie LifeConnect** please speak with your Macquarie Life Business Development Manager today.

The Macquarie LifeConnect adviser flyer is current as at 7 December 2011. The Macquarie LifeConnect service is provided by Macquarie Life Limited (MLL) ABN 56 003 963 773 AFSL 237 497. MLL is not an authorised deposit taking institution for the purposes of the Banking Act (Cth) 1959 and MLLs obligations do not represent deposits or other liabilities of Macquarie Bank Limited (MBL) ABN 46 008 583 542. MBL does not guarantee or otherwise provide assurance in respect of the obligations of MLL.

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FORWARD thinking

