

Singlife: EzSub Web Simplified Guide Feb 2025

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Singlife

Ezsub App to Ezsub Web

What is New?







Ezsub Web – Available on all platforms (except mobile phone)

Features:

- Web-based platform
- Enhanced accessibility with multiple entry points for creating customer profiles, generating quotations, and initiating applications
- Standardized quotation journey across all product lines, with premium modes calculated upfront
- Consolidated signing methods: Face-to-Face and Non Face-to-Face signing (via DocuSign)
- URL https://ezsub.singlife.com/web/login/
- Official Launch on 24 Feb 2025



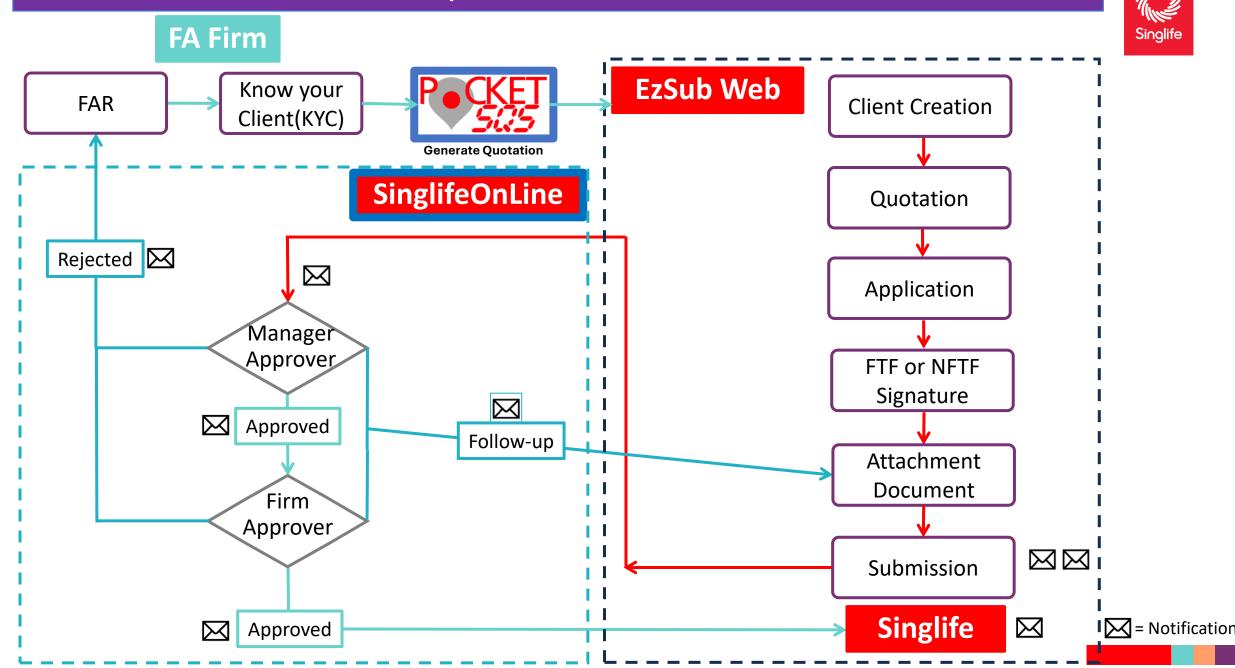
Agenda

- 1. Recap the Ezsub process
- 2. Multiple entry point of creating new customers
- 3. Multiple entry point of generating quotations
- 4. Multiple entry point of creating an application
- 5. New NFTF E-signing method



Re-Cap on FA Firm to Ezsub Flow







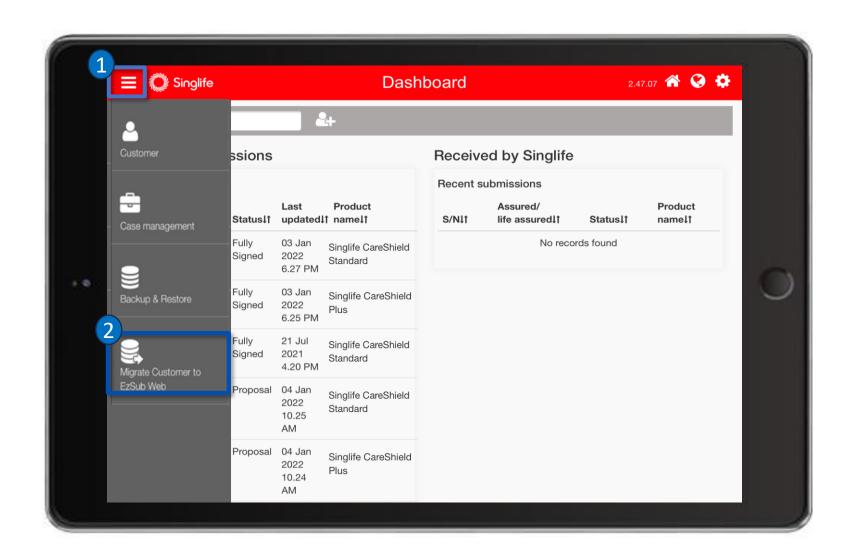
Data Migration

Option to migrate Customer profiles from App to Web

- Only Customer profiles will be migrated
- Customer profiles created on app after data migration will not be reflected on Web (and vice versa)
- Data migration can only be performed once



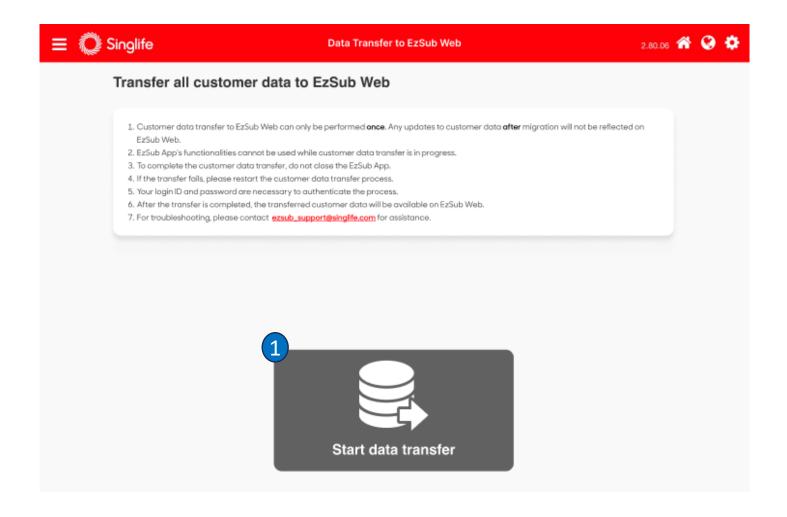
Data Migration from iPAD to Ezsub Web



- 1. Tap hamburger menu
 - Tap "Migrate Customer to Ezsub Web"



Data Migration

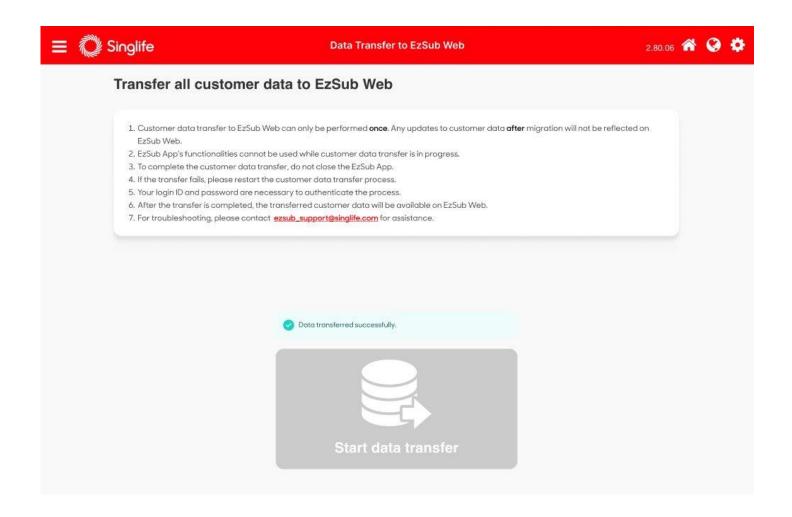


1. To begin data migration, click "Start data transfer"

Note: This process may take some time. Please remain on this page during the transfer.



Data Migration

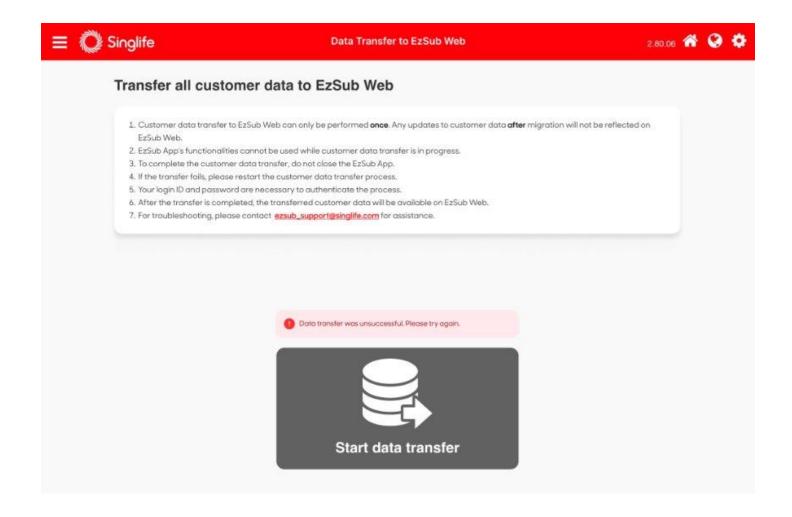


Once data migration has been completed successfully, a success message will appear.

You may proceed to login to EzSub Web to view your customer data.



Data Migration



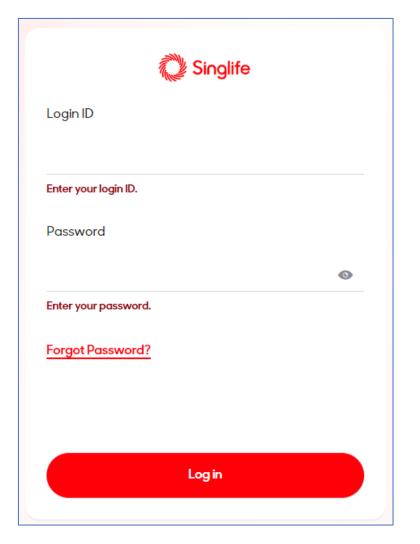
If data migration is unsuccessful, you may try again, or contact our helpdesk ezsub support@singlife.com



Basic Requirements

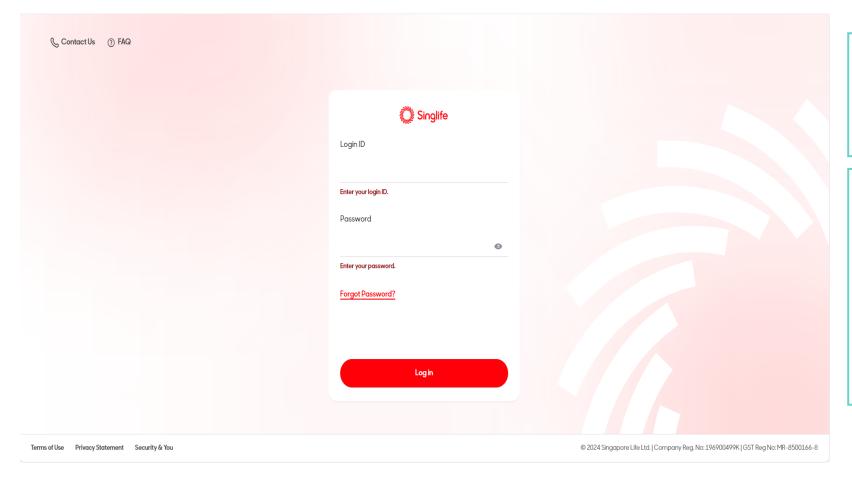
- Devices (iPad, Tablet, Laptop, Desktop)
- Web based platform compatible with multiple platforms (iOS, Android)
- Recommended Web Browser (Chrome & Edge)







Login ID no change



Login ID:

Singlife Online (SOL) User ID and Password

Login Difficulties:

IT Helpdesk

- +65 68279955 (Office Hrs)
- Singlifeonline_IThelpdesk@sing life.com

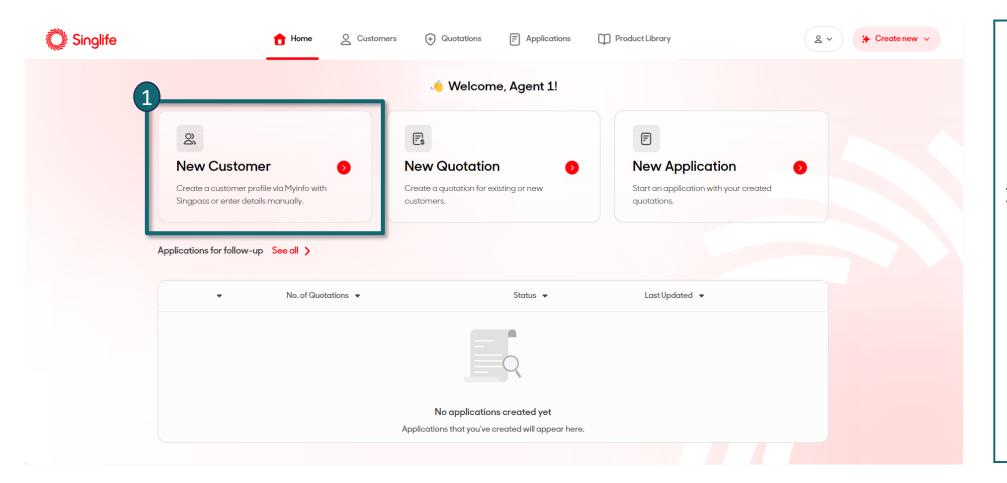


Customer Creation

E-Submission Process



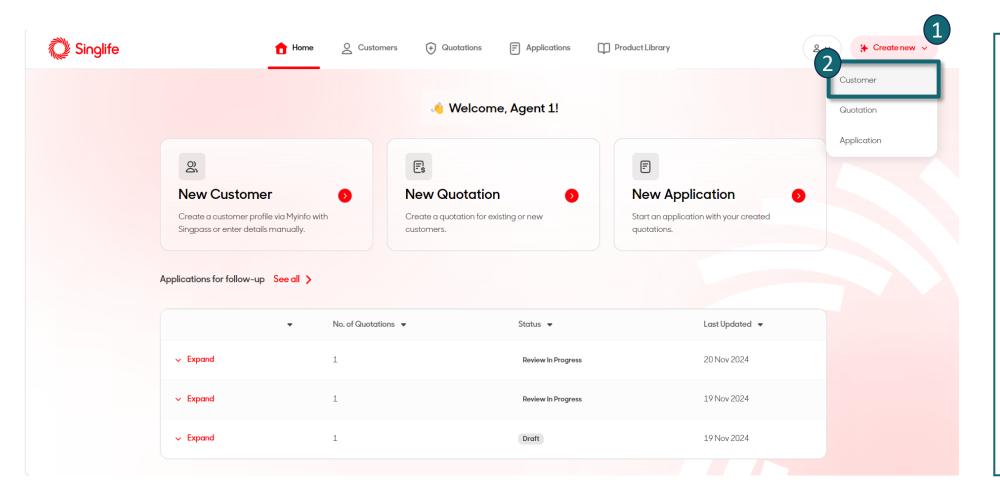
Entry point 1 - Dashboard



To create customer profile, tap on "New Customer" icon



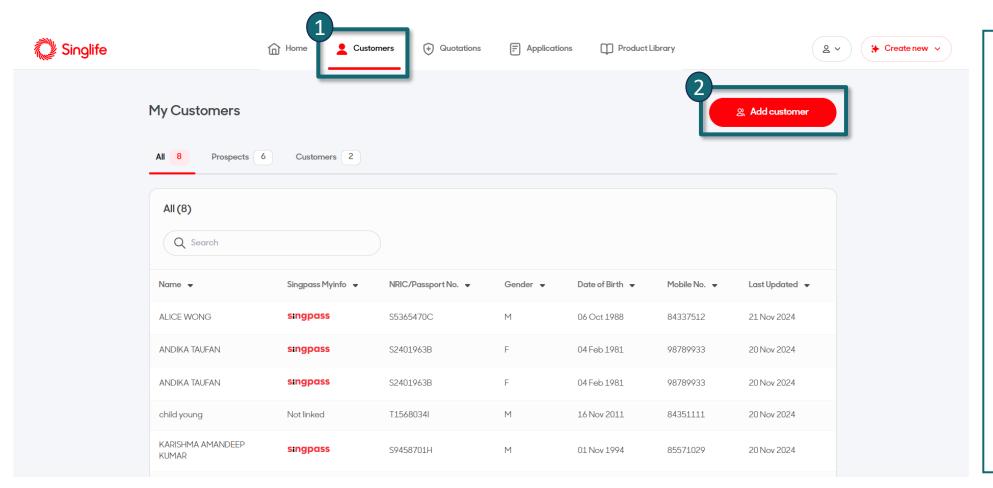
Entry point 2 - Dashboard



- Select "Create new" at the top right
- To create customer profile, tap on "Customer"



Entry point 3 - Customers module



- L. Dashboard:Select"Customers"header module
- To create customer profile, tap on "Add customer" icon



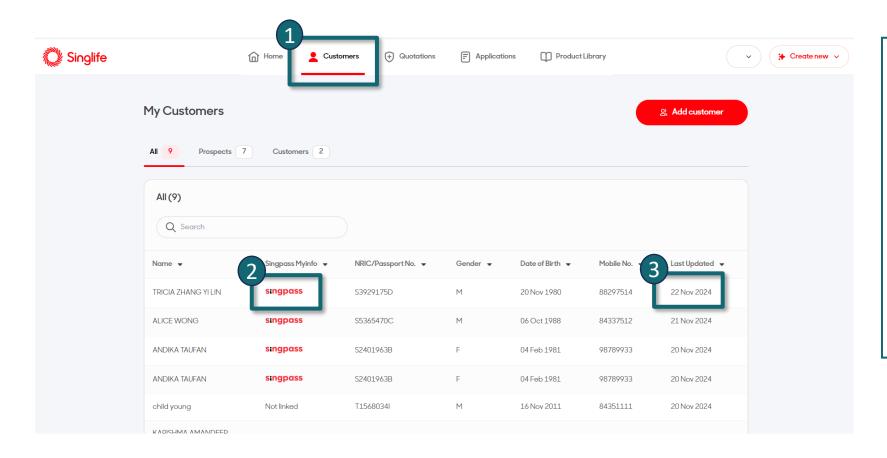
Customer Creation

Myinfo
(Recommended)

Manual Data Entry



Customer Profile



- List of all existing profiles created on EzSub
- 2. **singpass** indicates use of Myinfo in customer profile
- 3. Singpass validity is for 1 year from the date of extraction



E-Submission Process

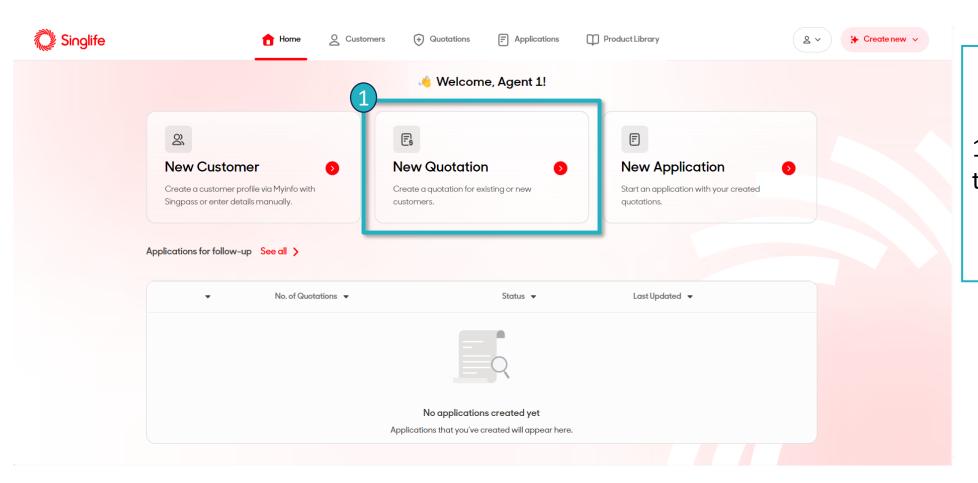




Quotation



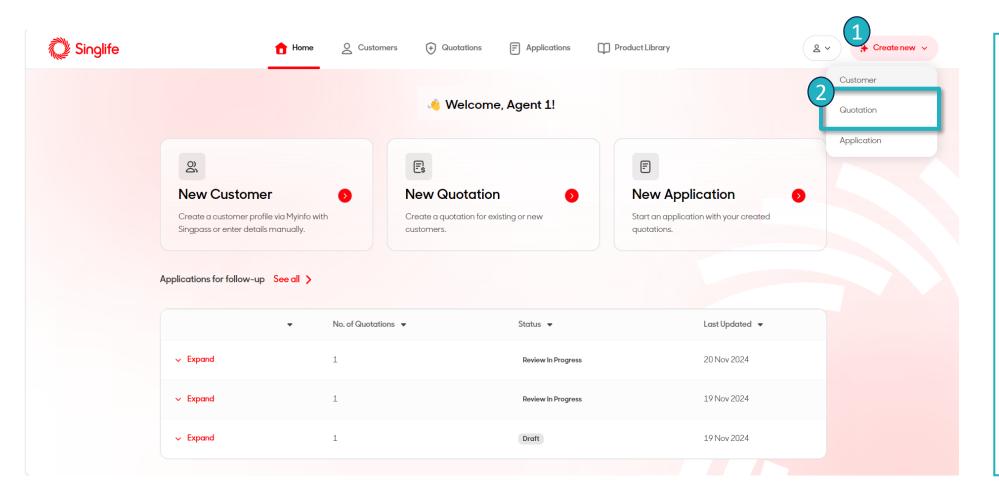
Entry point 1 - Dashboard



1. Tap "New Quotation" to generate quotations



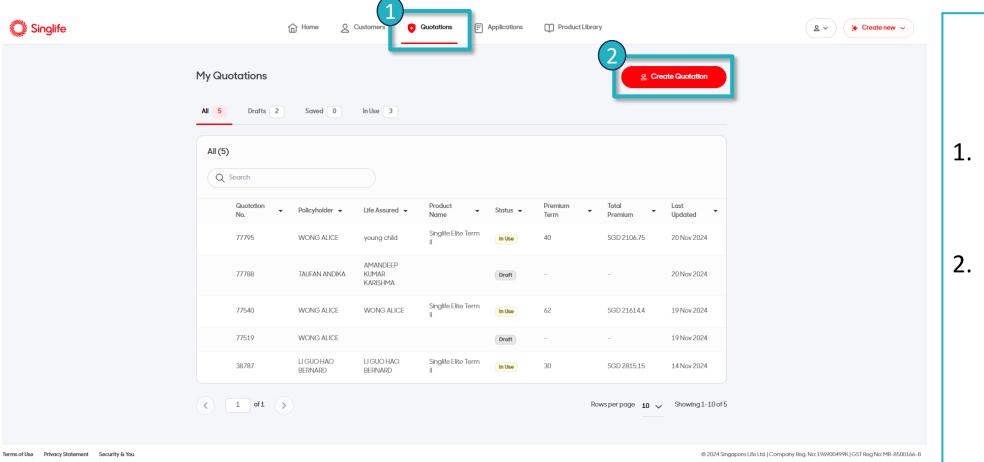
Entry point 2 - Dashboard



- Select "Create new" at the top right
- To create new Quotation, tap on "Quotation"



Entry point 3 – Quotations module



- L. Dashboard: Select "Quotations" module
- To create quotation, tap on "Create Quotation" icon

Standardized quotation journey

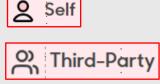


Select product category

- Select any one option
- ← Life Insurance
- Medical & Health Insurance
- (+) CareShield
- Accident Guard
- ElderShield
- Dementia Cover

Which quotation will you be creating?

Select any one option





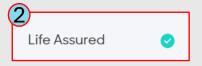
Select assured (Policy Owner)

 Select <u>assured</u> either "New EzSub Profile" or "Existing EzSub Profile"



If "Third-Party" application, pls select dependant (Life Assured)

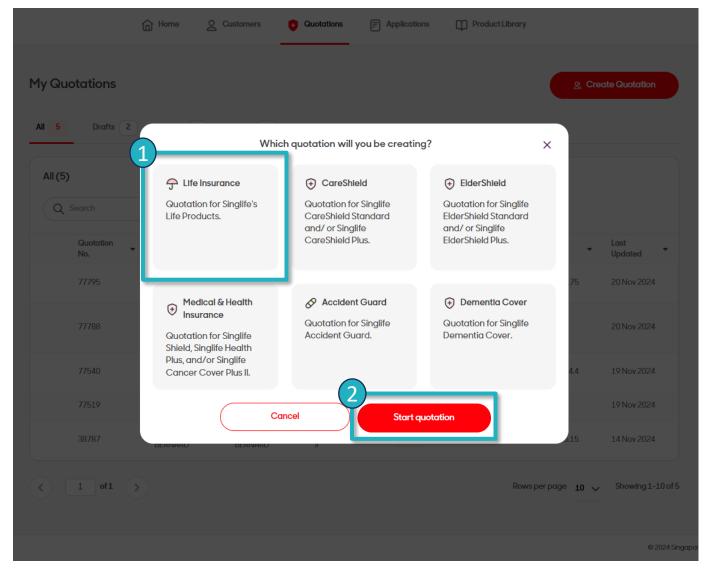
Select <u>life assured</u>
 either "New EzSub
 Profile"
 or "Existing EzSub
 Profile"







Create a Quotation

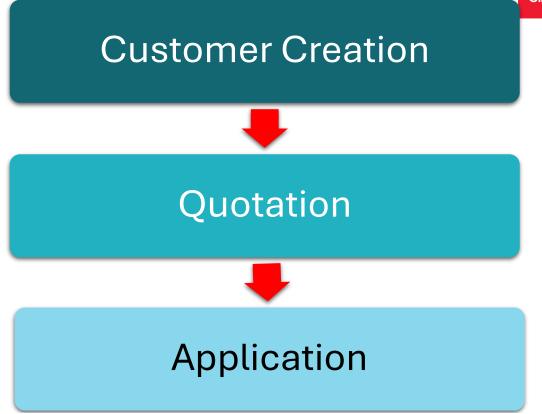


Integrated Quotation System

- 1. Select Product Category
- 2. Tap "Start quotation"

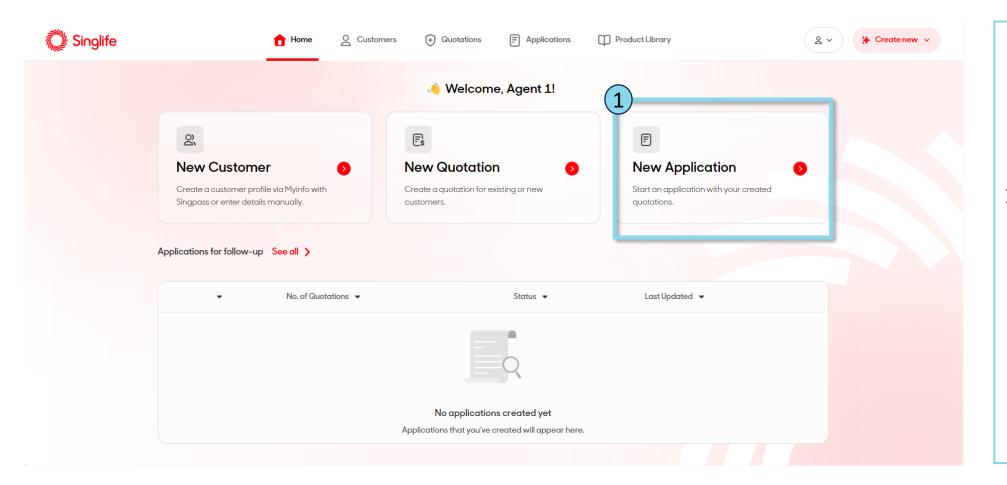


E-Submission Process





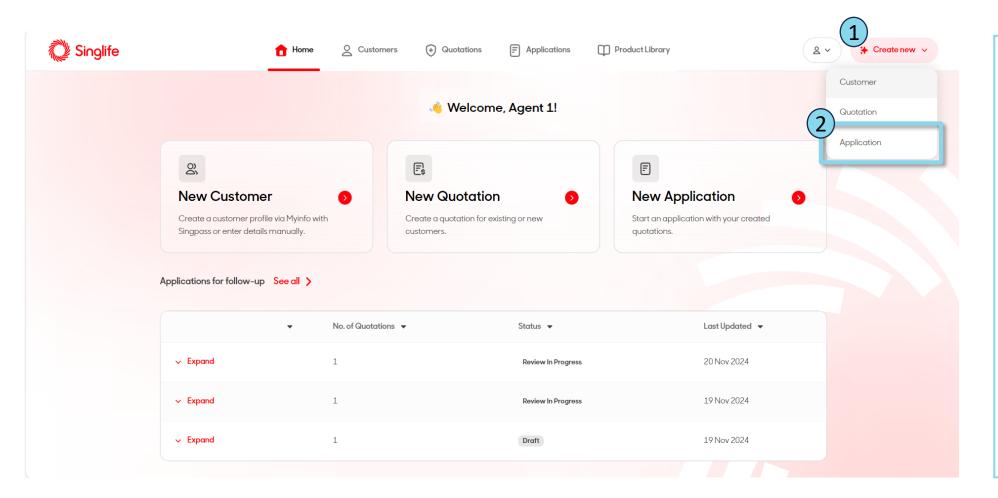
Entry point 1 - Dashboard



To create new application, tap on "New Application" icon



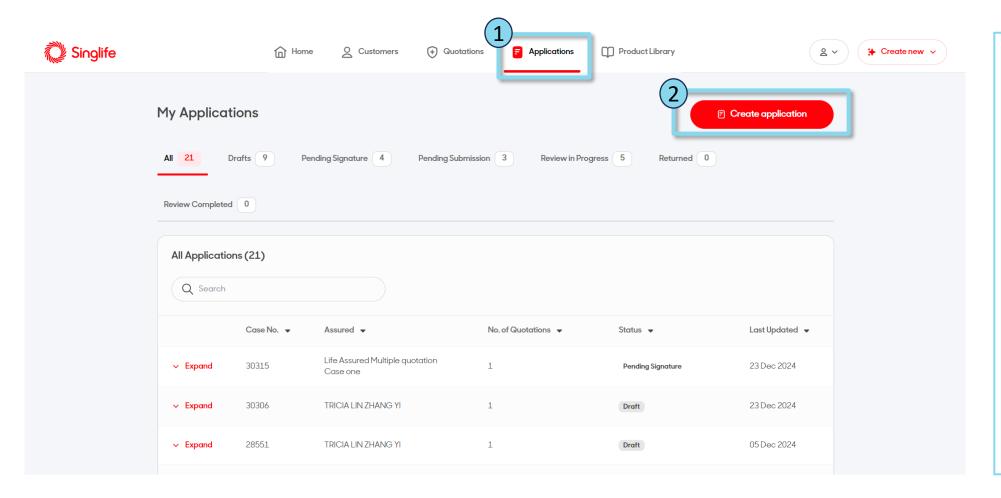
Entry point 2 - Dashboard



- Select "Create new" at the top right
- 2. To create new application, tap on "Application"



Entry point 3 – Applications module



- L. Dashboard:Select"Applications"header module
- To create new application, tap on "Add customer" icon



ESignature

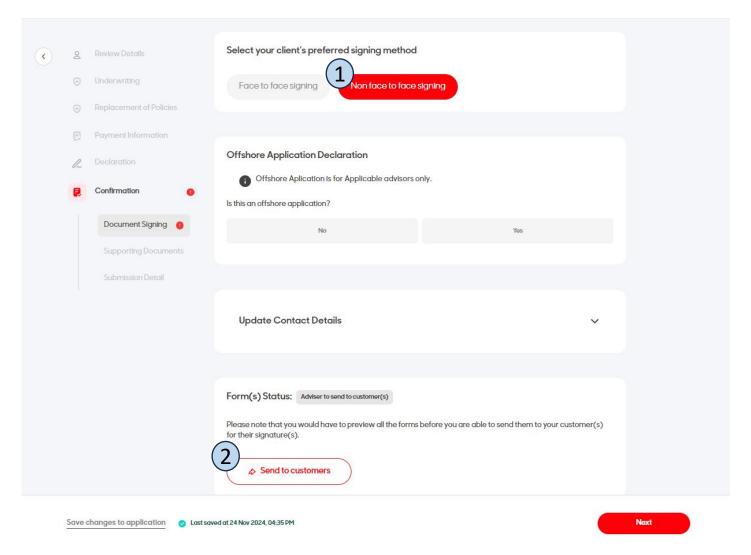
Face to Face

2

Non Face-to-Face



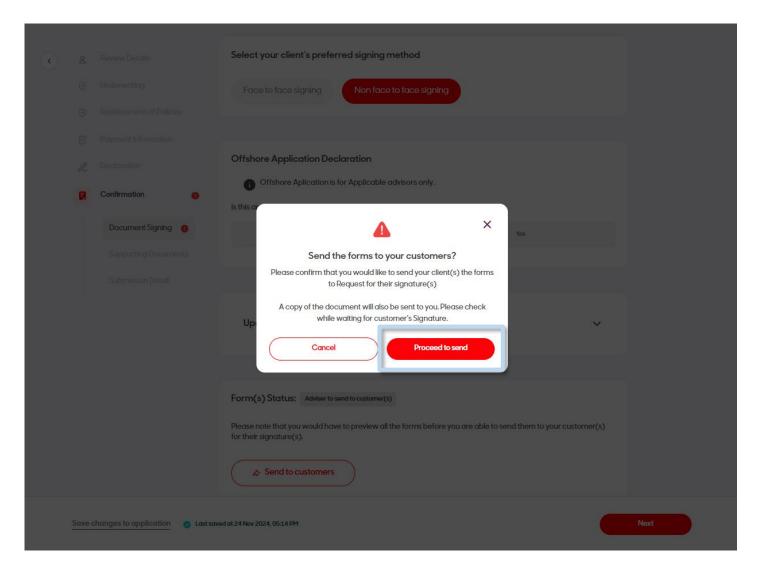
Non Face to Face

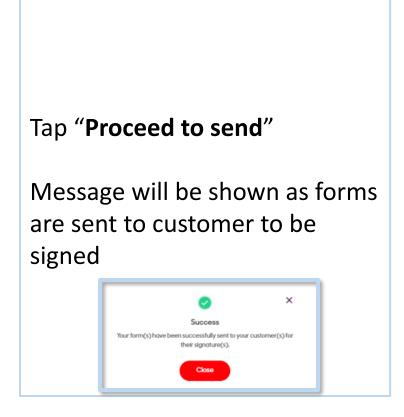


- Choose "Non face to face signing"
- 2. Tap "Send to customers"

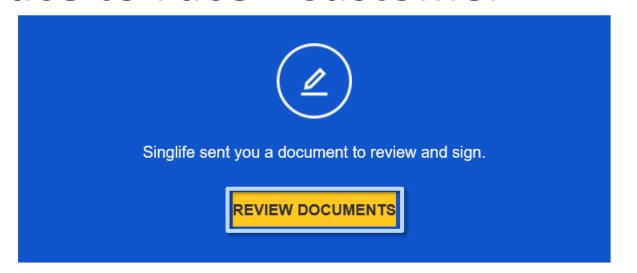


Non Face to Face









Tap on "REVIEW DOCUMENTS"

Singlife

ezsub support@singlife.com

Dear Tan Son,

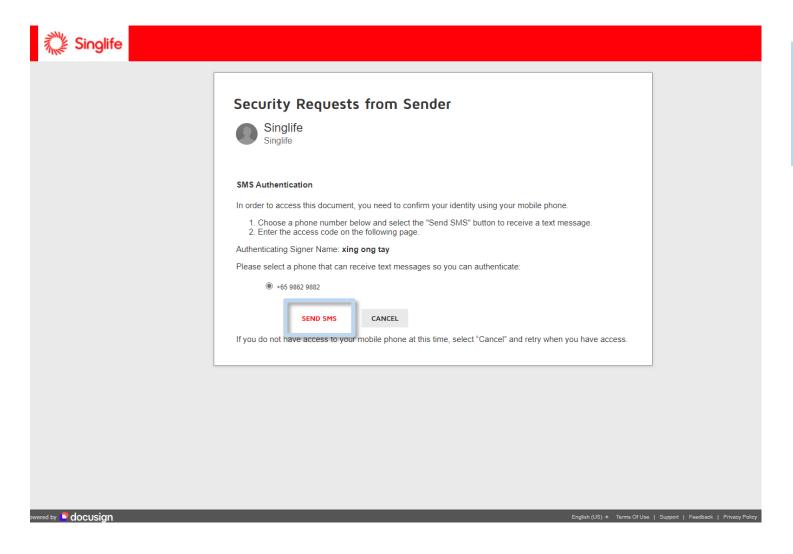
To complete your application, please click on "Review Documents" above.

Please note that this link will expire in 30 days.

Yours sincerely (on behalf of Agent 2),

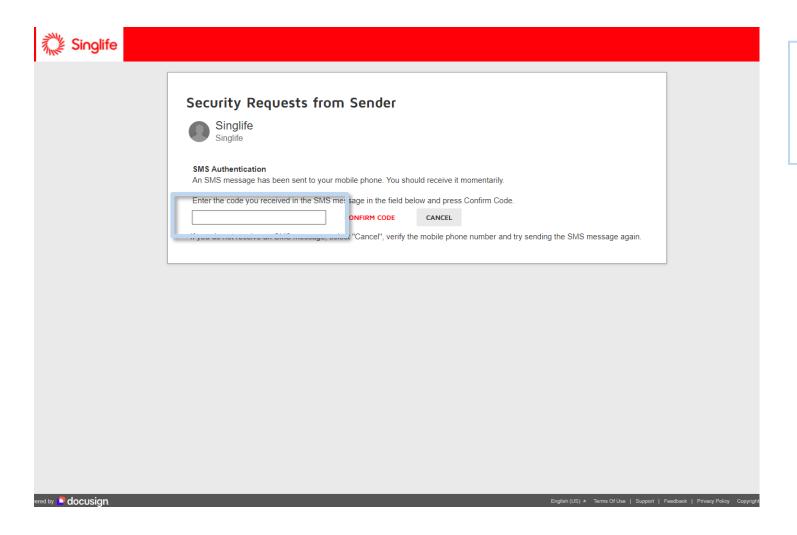
Singapore Life Ltd.\nCo. Reg. No. 196900499K





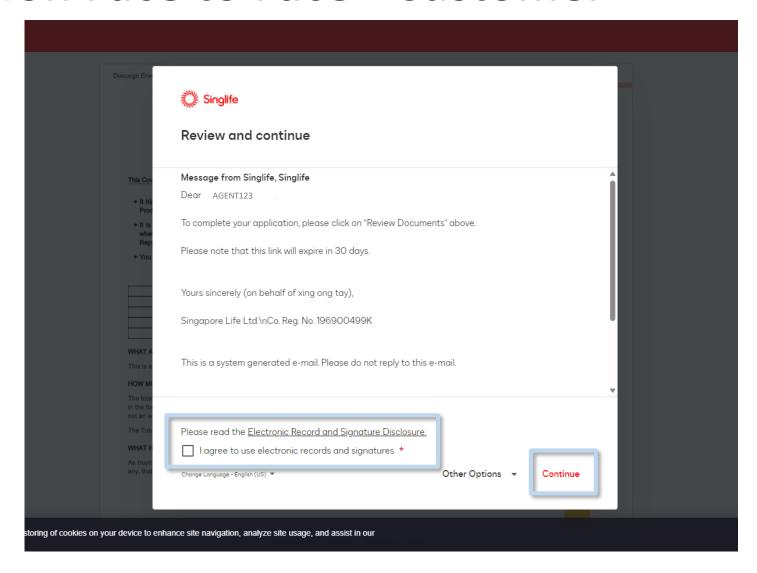
Tap on "SEND SMS"





Enter OTP





Tick "I agree to use electronic records and signatures"

Tap on "Continue"

stomer Creation Quotation Application E-Submission

Page 1 of 1

1 of 1



Non Face to Face - Customer

START

- (4) I/We authorise any medical source, insurance office, or organisation to release to Singapore Life Ltd. and Singapore Life Ltd. to release to any medical source, insurance office or organisation, to the extent permitted by law, all relevant information concerning me/us and/or any proposed life assured at any time, regardless of whether the application(s) is accepted by Singapore Life Ltd. A photographic or electronic copy of this authorisation shall be as valid as the original.
- (5) I/We am/are aware that the latest edition of the respective Fund Prospectuses may be found on www.singlife.comand I/we have read and understood the applicable sections of the most recent edition of the respective Fund Prospectuses in relation to my/our application(s) (applicable to investment-linked plans only).
- (6) I/We are not Selected Clients. A Selected Client is any individual who meets any two of the following criteria:
- Aged 62 years or older;
- Not proficient in written or spoken English; or
- Has below GCE 'O' level or 'N' level qualifications, or equivalent academic qualifications.
- (7) The Fact Find Form has been discussed with me/us, and my/our Representative has explained its contents and recommendations and I/we agree with those recommendations.
- (8) I/We understand that where confirmation calls are required and Singapore Life Ltd. is unable to confirm my/our purchase within 30 working days from the date the policy is issued, Singapore Life Ltd. will terminate my/our policy. Singapore Life Ltd. will contact me using this number 6994 2490.

Representative's Declaration:

- (1) I confirm that I have presented the Fact Find Form to the customer, and its contents and recommendations have been discussed, explained to and agreed by the customer. For the Singlife policy(ies) recommended, I have presented the Application Form(s), Cover Page(s), Policy Illustration(s), Product Summary(ies) and Bundled Product Disclosure Document(s) to the customer electronically, and the customer understands and accepts the benefits of the plane).
- (2) I declare that:
- · This application comes through a reverse enquiry from my firm's existing customer(s) whose identity(ies) I have verified previously.
- The customer earns an annual income of at least SGD120,000 or its equivalent in a foreign currency.
- Including this sale, the value of monthly premiums from all customers located overseas is within 5% of my firm's total monthly premiums

Signature of Life Assured (for age next birthday 17 years & above)	Signature of Financial Adviser Representative
Sign <u>+</u> 24/11/2024 5:22:43 PM SGT	I confirm that I have sighted the original(s) of my customer's identification document(s) (if applicable).
xing ong tay S8717594D	AGENT123 6000xxxx

Singapore Life Ltd.4 Shenton Way #01-01 SGX Centre 2 Singapore 068807• Tel: (65) 6827 9933 singlife.com Company Reg. No.: 196900499K GST Reg. No.: MR-8500166-8

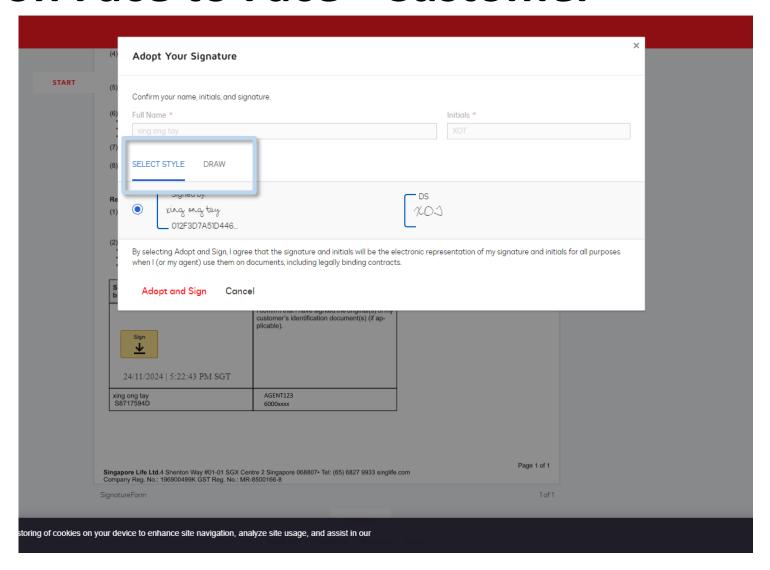
Form

storing of cookies on your device to enhance site navigation, analyze site usage, and assist in our

Review the document

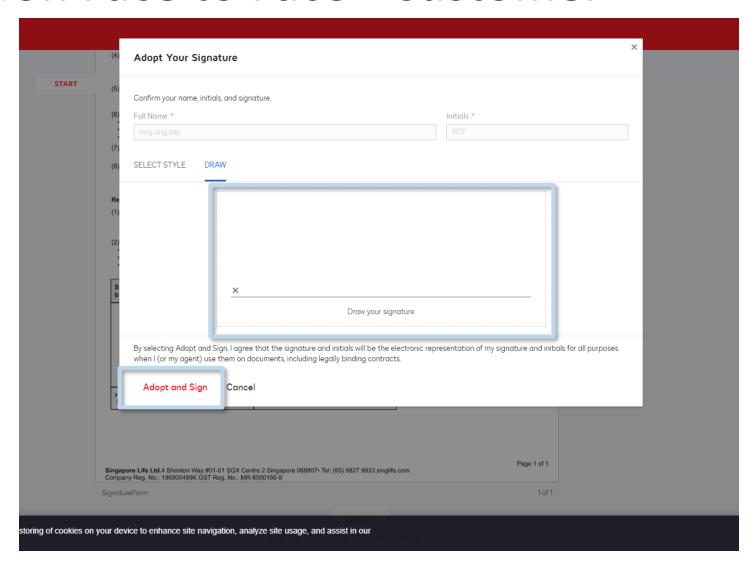
Click on "Sign" icon





Select Signature style





Draw Signature

Click on "Adopt and Sign"



- (4) I/We authorise any medical source, insurance office, or organisation to release to Singapore Life Ltd. and Singapore Life Ltd. to release to any medical source, insurance office or organisation, to the extent permitted by law, all relevant information concerning me/us and/or any proposed life assured at any time, regardless of whether the application(s) is accepted by Singapore Life Ltd. A photographic or electronic copy of this authorisation shall be as valid as the original.
- (5) I/We am/are aware that the latest edition of the respective Fund Prospectuses may be found on www.singlife.comand I/we have read and understood the applicable sections of the most recent edition of the respective Fund Prospectuses in relation to my/our application(s) (applicable to investment-linked plans only).
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Signature of Life Assured (for age next birthday 17 years & above)	Signature of Financial Adviser Representative
	I confirm that I have sighted the original(s) of my customer's identification document(s) (if applicable).
Signed by:	
xing ong tay	
24/11/2024 5:22:43 PM SGT	
xing ong tay S8717594D	AGENT123 6000xxxx

Ready to Finish?

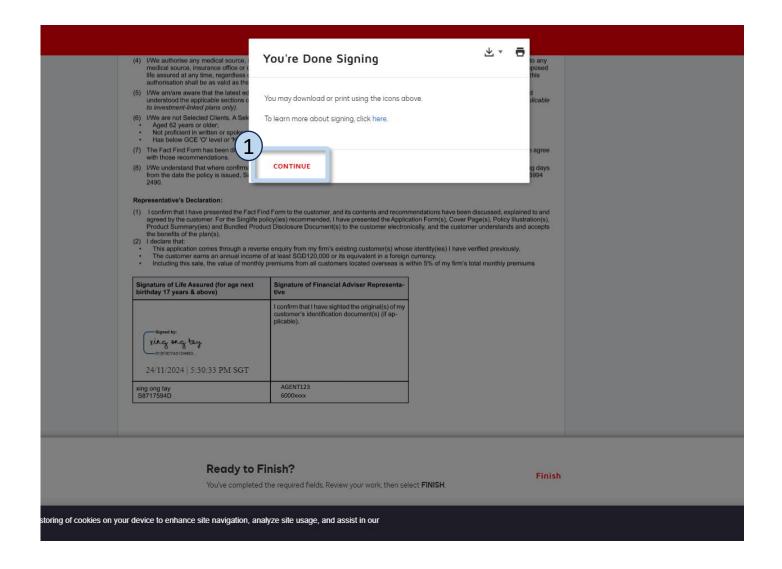
You've completed the required fields. Review your work, then select FINISH.

Finish

storing of cookies on your device to enhance site navigation, analyze site usage, and assist in our

Tap "Finish"



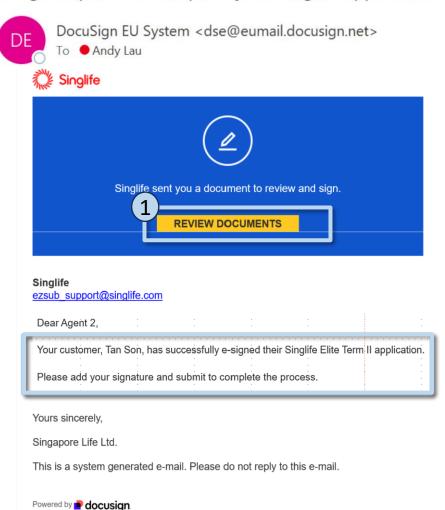


1. Tap "Continue"



Non Face to Face - Adviser

E-Sign required to complete your Singlife application

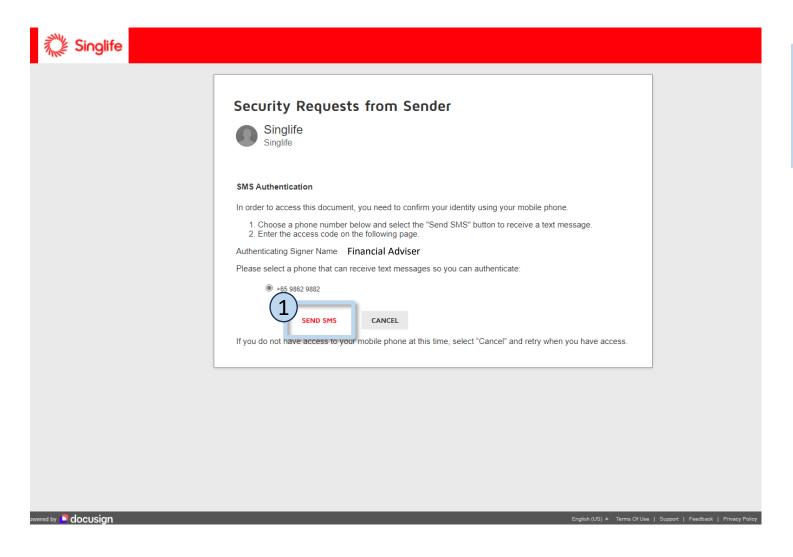


1. Tap on "REVIEW DOCUMENTS"

Similar to Customer Journey



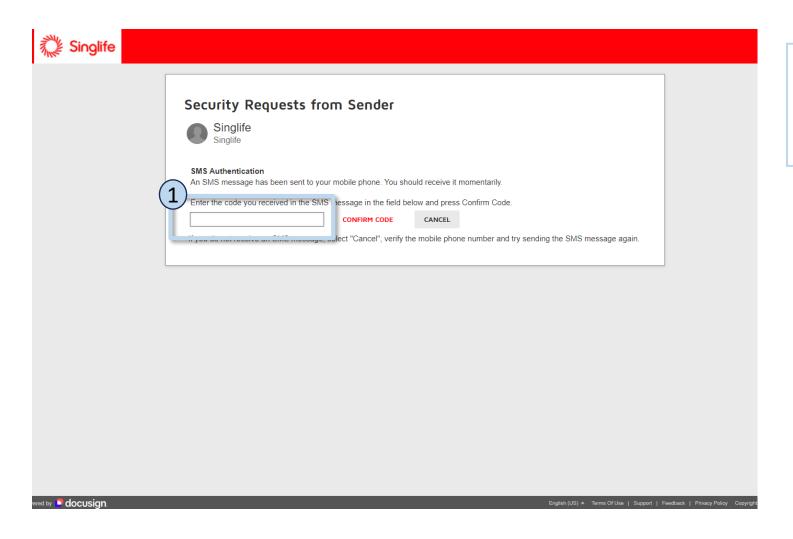
Non Face to Face - Adviser



1. Tap on "SEND SMS"



Non Face to Face - Adviser

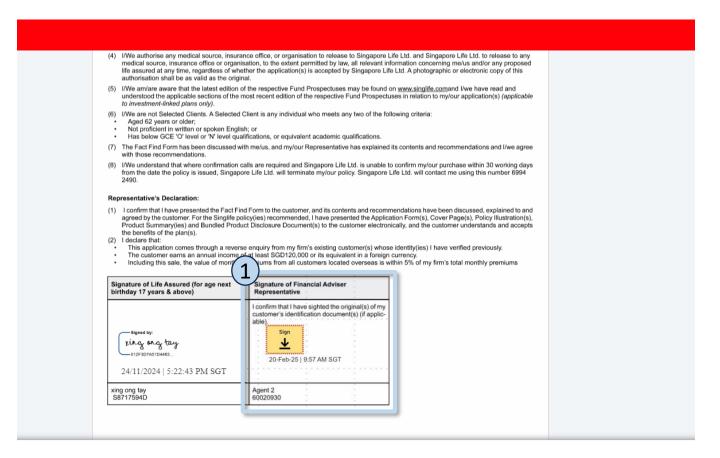


1. Enter OTP



1. Adviser sign

Non Face to Face - Adviser



Ready to Finish?

You've completed the required fields. Review your work, then select FINISH.

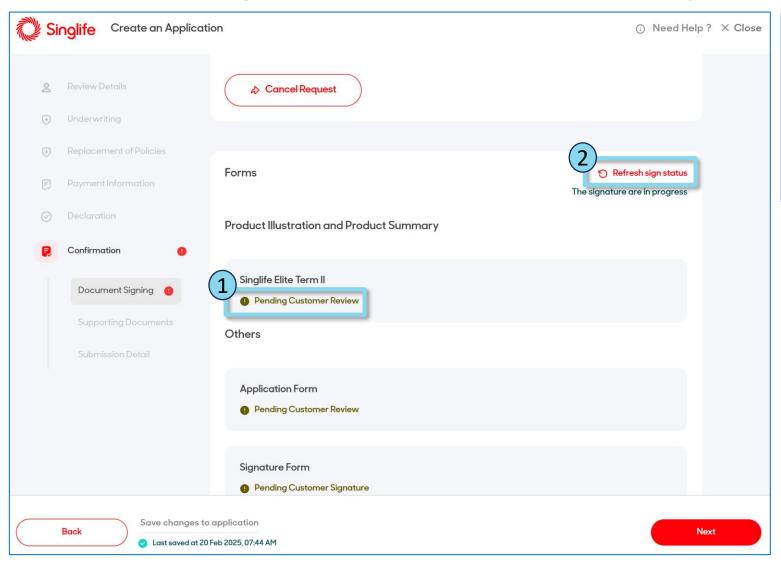
Finish

storing of cookies on your device to enhance site navigation, analyze site usage, and assist in our

46



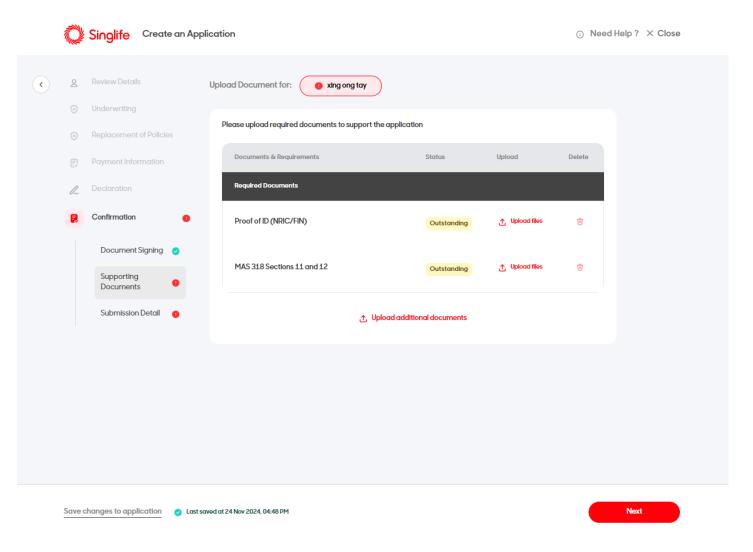
Refresh sign status if necessary



- If status still showing "Pending Customer Review"
- 2. Click "Refresh sign status"



Supporting Documents



Upload Mandatory documents:

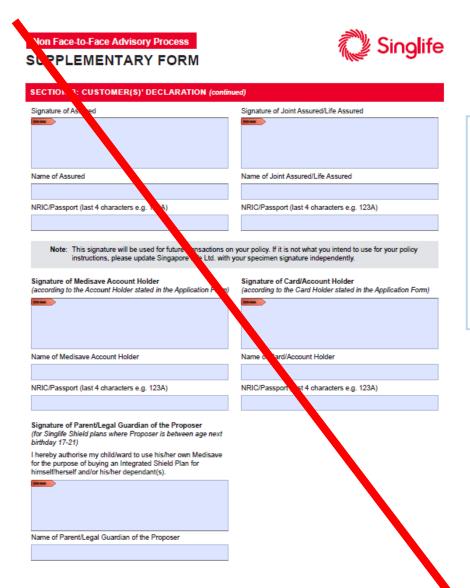
- Life Assured ID
 - Not Applicable if using Myinfo
- MAS 318 Sections 11 and 12 (Know Your Client (KYC) / Fact Find Form)

Note:

If using NFTF, not required to attach Non Face to Face Supplementary form

NFTF Supp Form



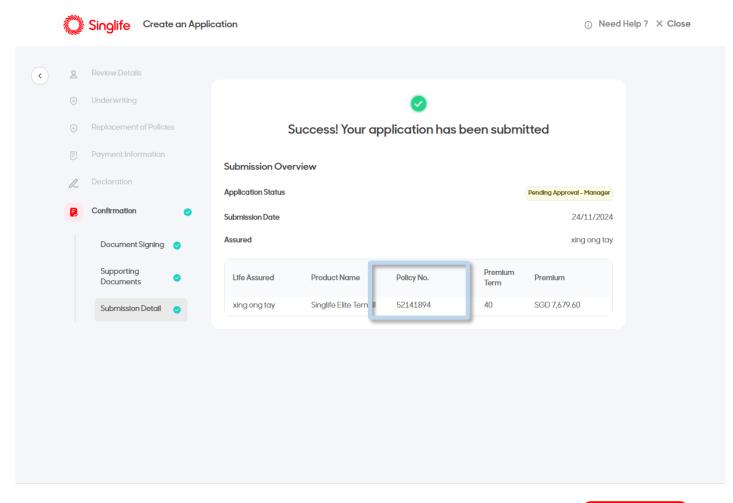


Note:

If using NFTF signing, not required to attach Non Face to Face Supplementary form



Submission Detail



Policy Number generated for follow up with Singlife



Contact

- BDM (Pre-sales & Post Sales)
- Andy Lau (Ezsub on-line submission)
 - HP: 8112 7779
 - Email: andy_lau@singlife.com
- Merissa Siew (Backup)
 - Email: merissa_siew@singlife.com
- Technical Issue
 - Email: Ezsub_Support@singlife.com
 - Attach print screen of any error messages

