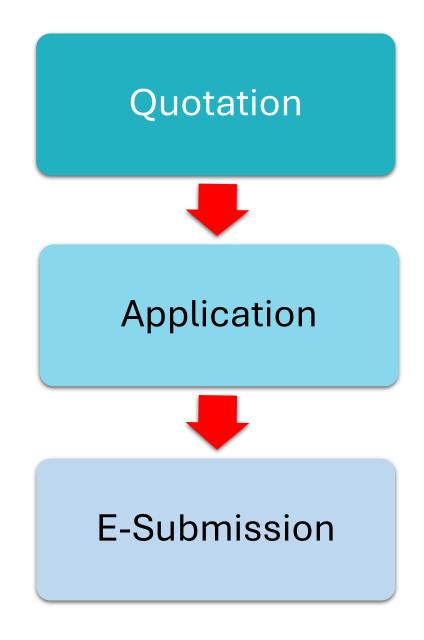
# E-Submission Process

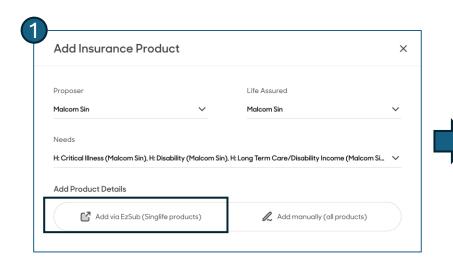


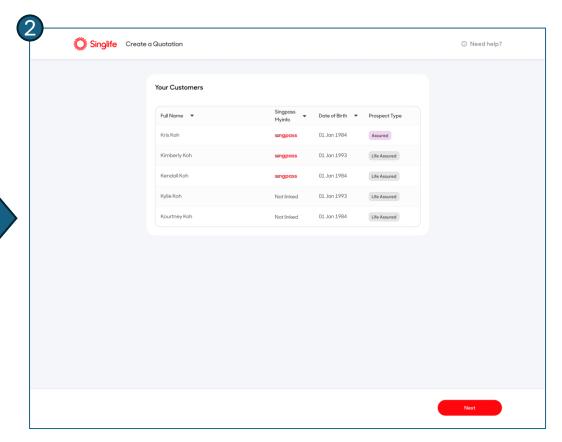
# E-Submission Process

Quotation



## Propel → EzSub



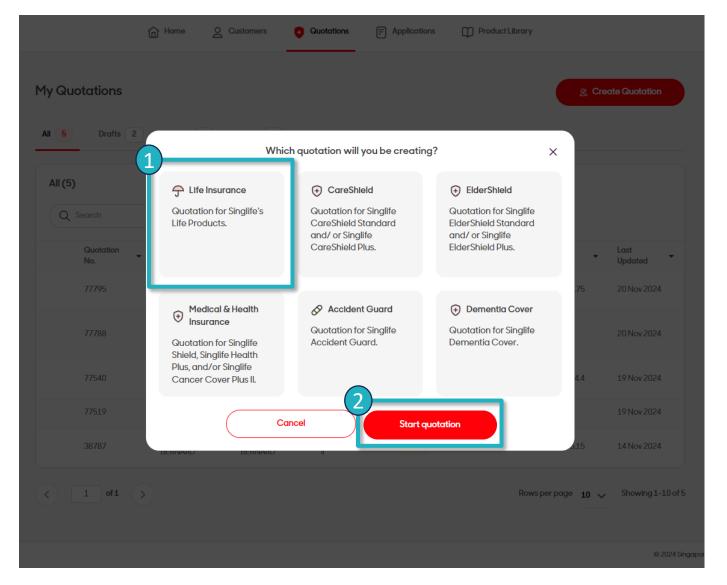


- 1. To get a quote for Singlife products, click on "Add via EzSub (Singlife products".
- 2. EzSub web will open with a list of eFNA customers.





#### Create a Quotation

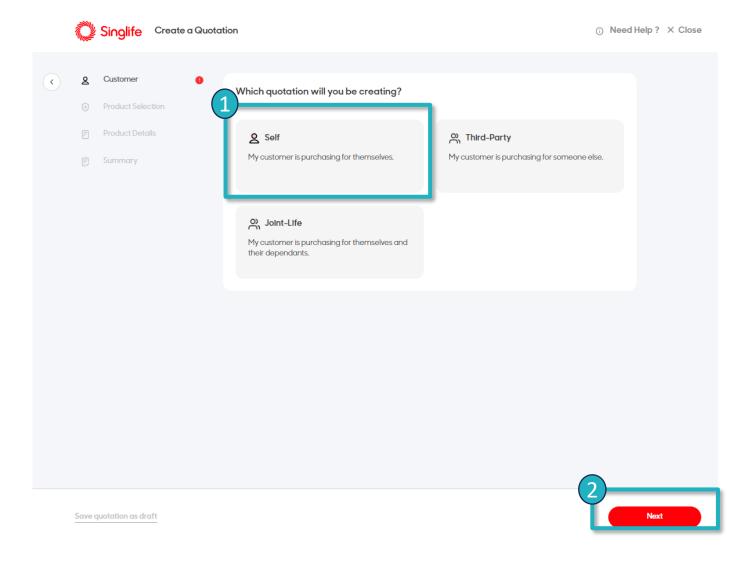


**Integrated Quotation System** 

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



#### Create a Quotation

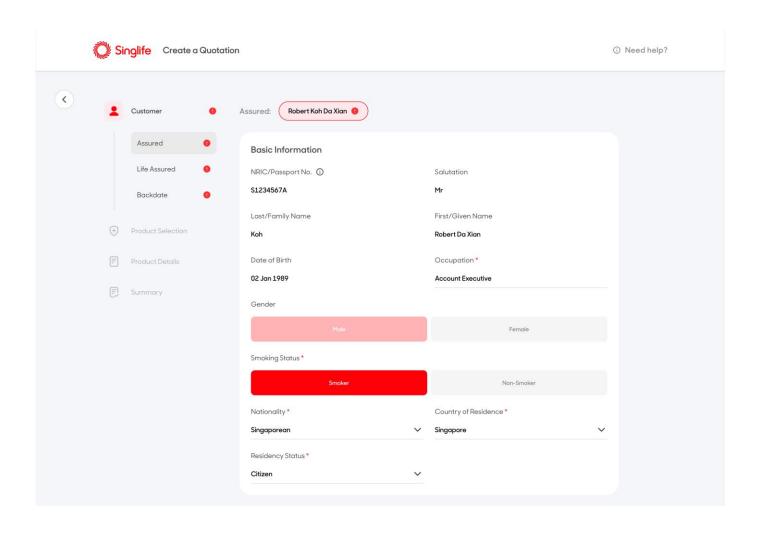


#### **Advisor**

- Select "Self", "Third-Party" or "Joint-Life" accordingly
- 2. Tap "Next" to create new case



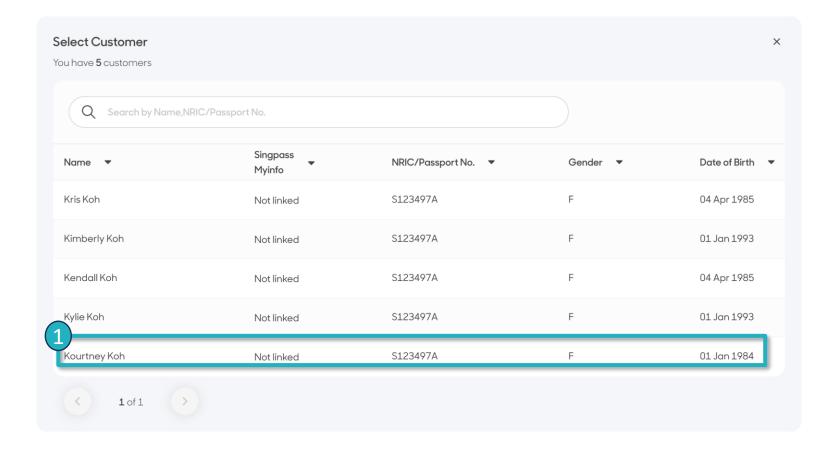
#### Assured



Assured information will be prefilled from eFNA.



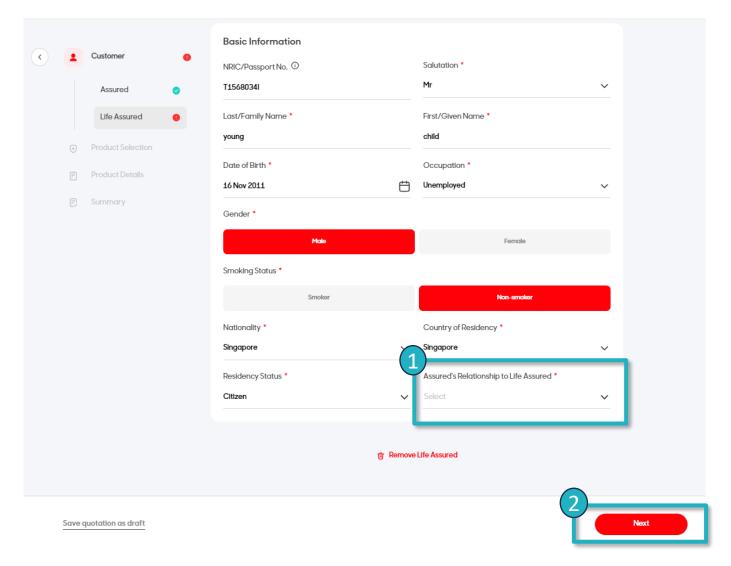
# Third Party – Life Assured



1. Select Life Assured's name



# Third Party – Life Assured

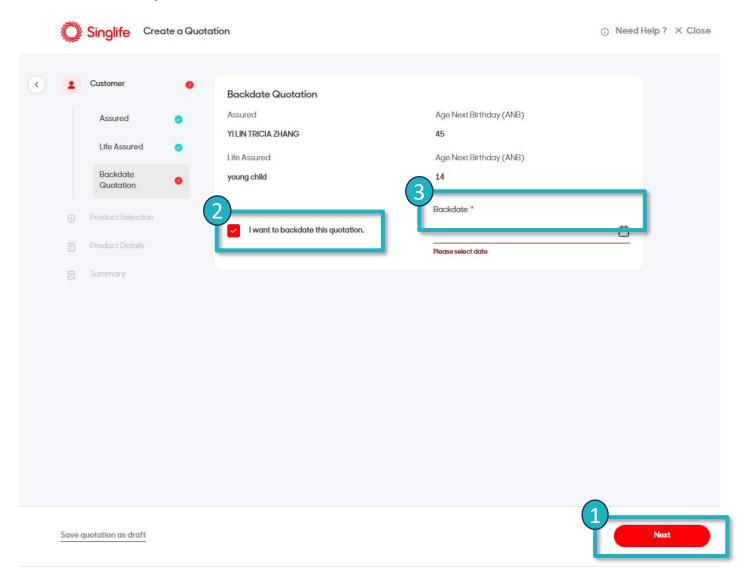


Life Assured details will be populated from eFNA

- Update Assured's Relationship to Life Assured
- 2. Tap 'Next' to proceed



#### Backdate quotation

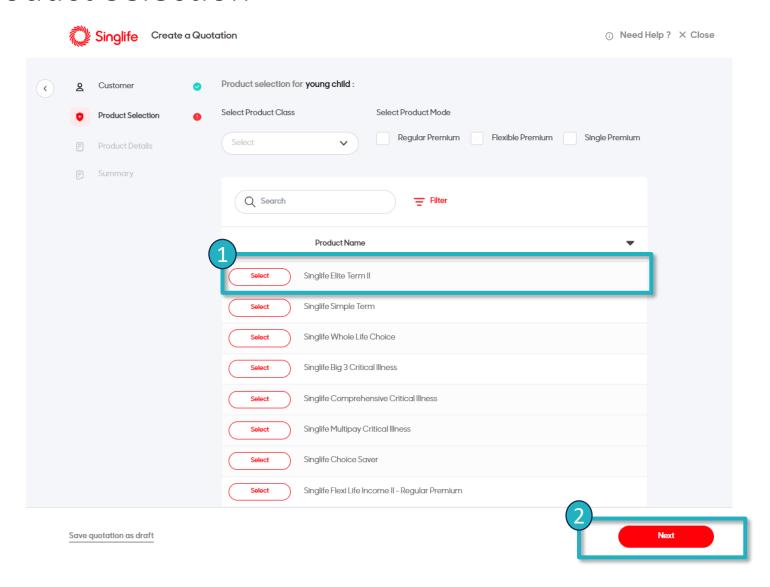


If backdate is not required, proceed by pressing 'Next

- If backdate is not required, tap on 'Next' to proceed
- 2. If backdate is required, tick on 'I want to backdate this quotation'
- Select the date to be backdated and tap on 'Next'



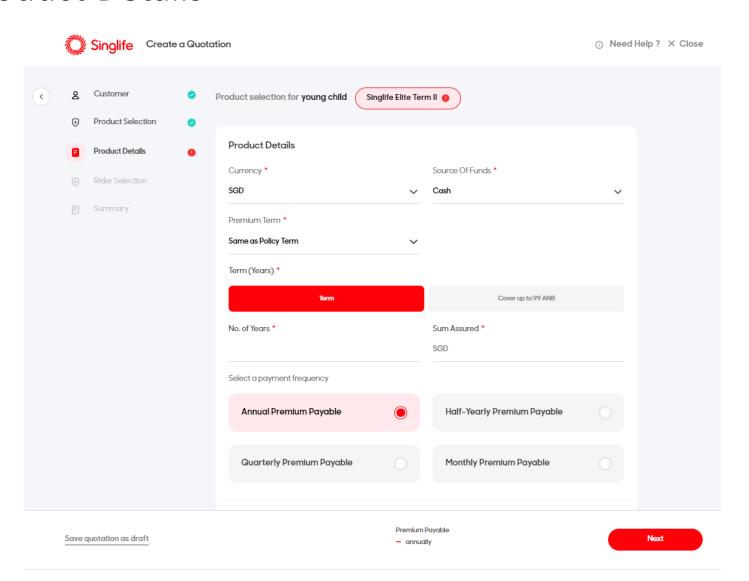
#### **Product Selection**



- 1. Select Product to be purchased
- 2. Tap on 'Next'



#### **Product Details**



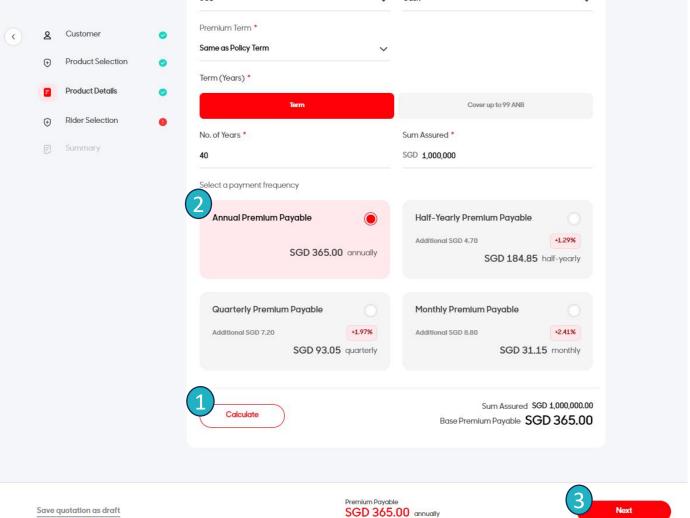
Select and input Product details accordingly

Mandatory fields are marked with a red asterisk \*



#### **Product Details**

Internal



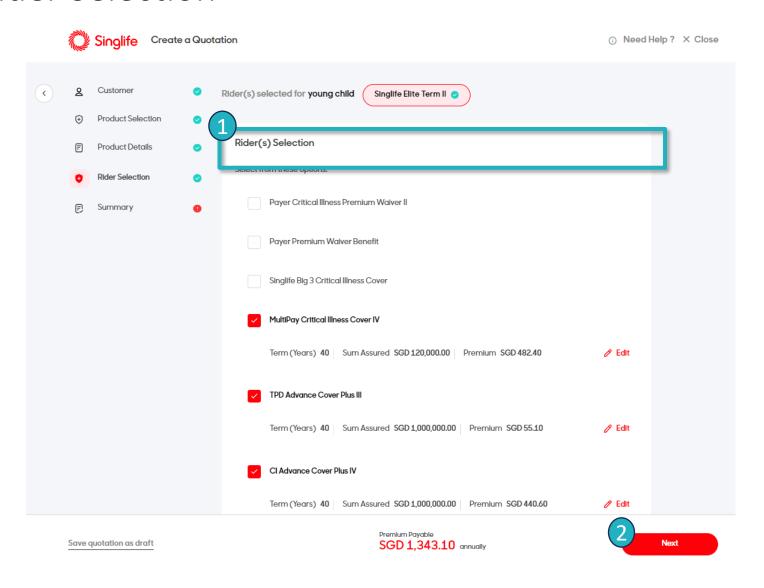
- Tap 'Calculate' to generate premium amount
- Select payment frequency
- Tap 'Next' to proceed

#### **NEW!**

Multiple payment frequency shown in one glance, with premium amount difference



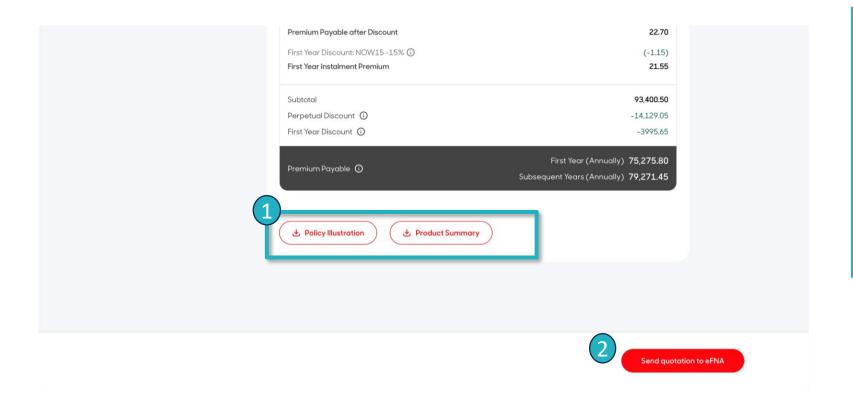
#### Rider Selection



- Select Rider(s)
- 2. Tap "Next" to proceed



#### Summary

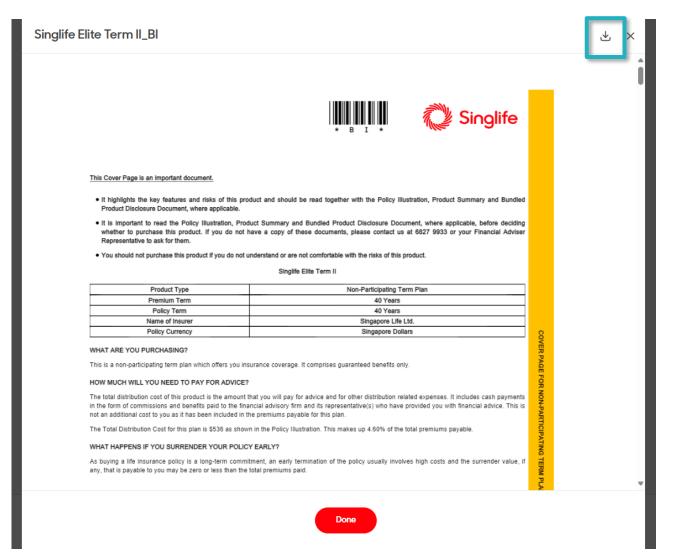


Policy Illustration and Product Summary generated

- Tap document to view download
- Tap 'Send quotation of eFNA' to proceed



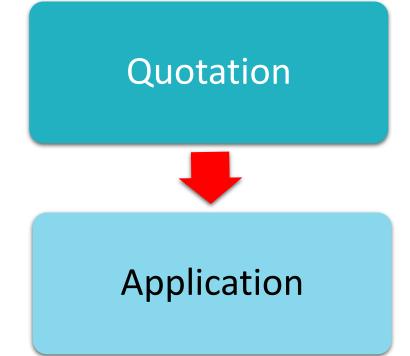
# Policy illustration



Tap on Licon to download PDF file

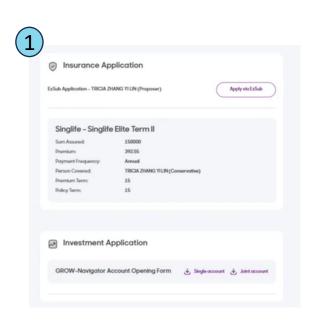


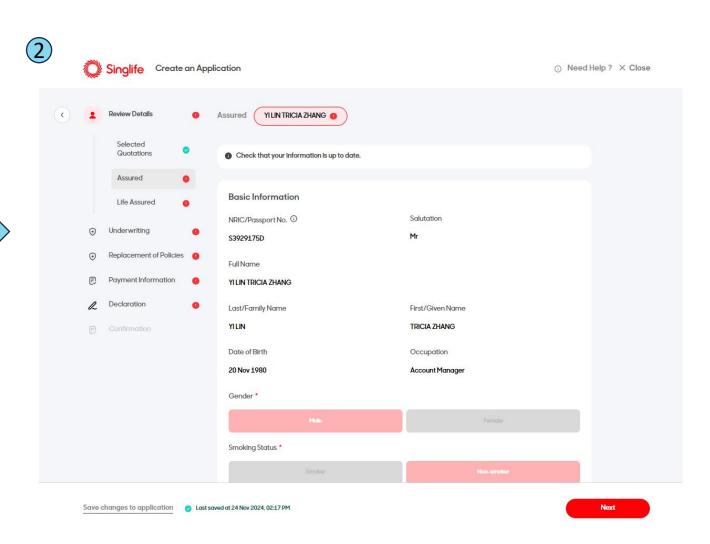
# E-Submission Process





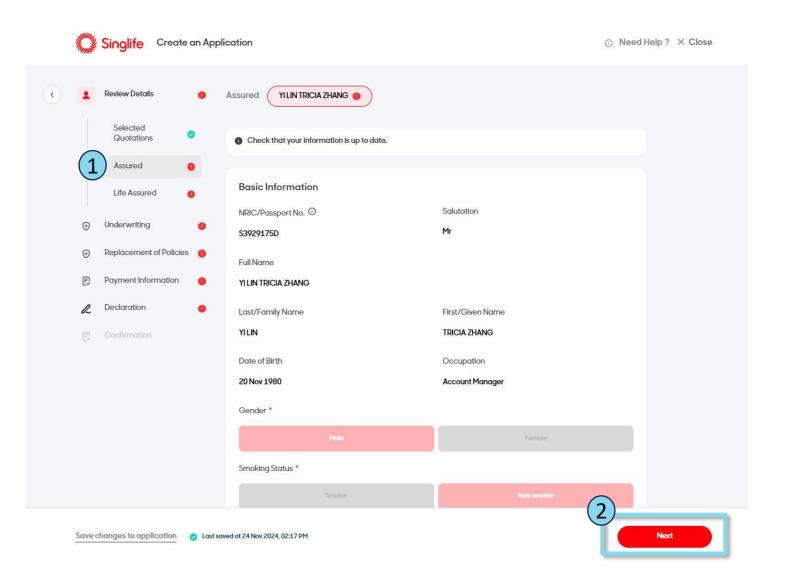
# Propel → EzSub







#### Your Particulars - Assured



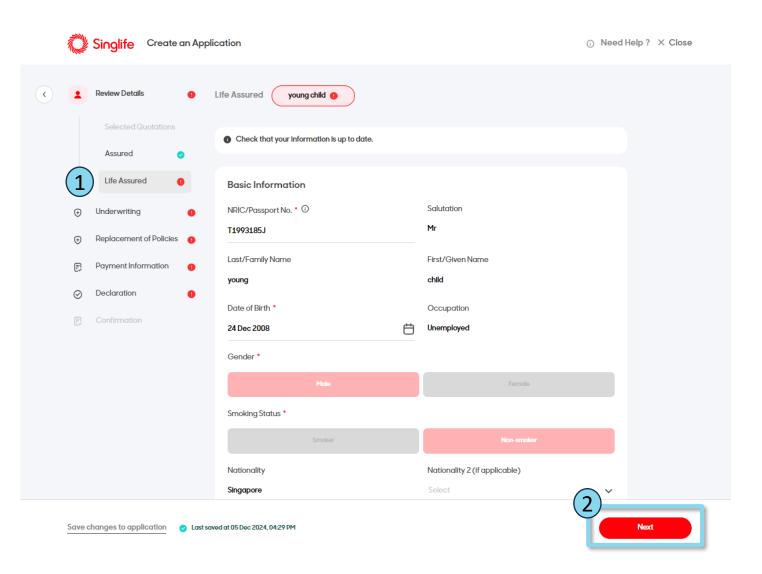
- 1. Verify details for Assured
- 2. Tap 'Next'
- NRIC validity check
   Identity card or passport number

  S1234567A

  Invalid Identity card or passport number
- At this stage, any amendments to customer's data <u>will not be updated</u> in initial customer's Profile



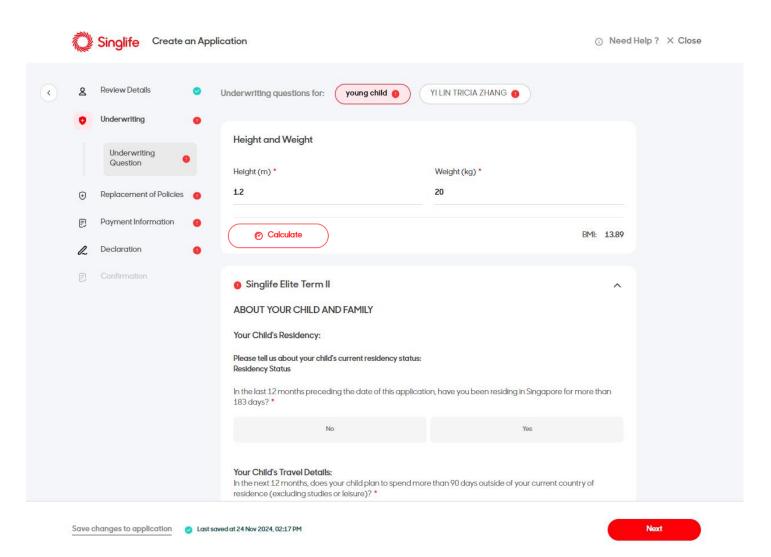
#### Your Particulars – Life Assured



- Update details for Life Assured
- 2. Tap 'Next'

 At this stage, any amendments to customer's data <u>will not be updated</u> in initial customer's Profile



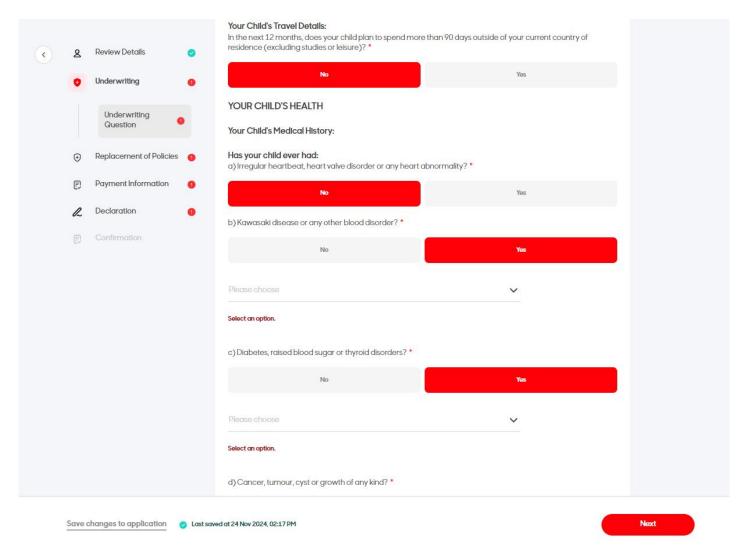


#### **Underwriting**

- Height and Weight to be filled in before UW qns appear
- All pre-filled data will be <u>erased</u> if you changed the Height & Weight data

20

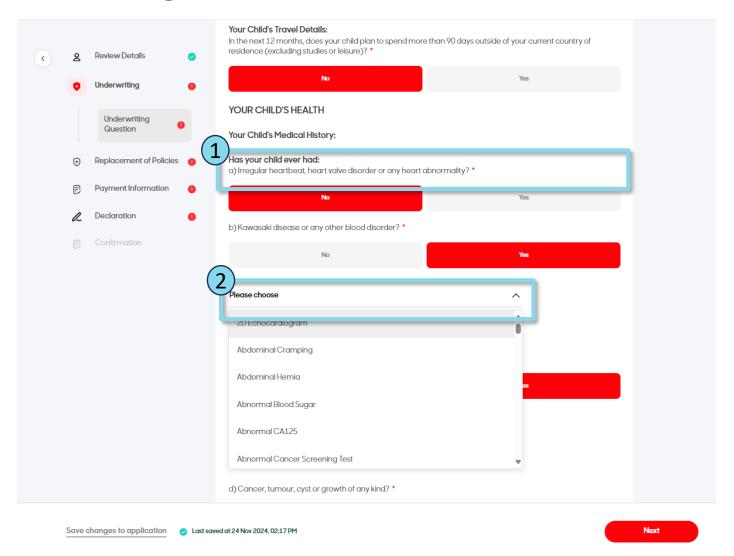




#### **Underwriting**

- Dynamic and responsive UW qns
- Subsequent qns generated based on your previous response

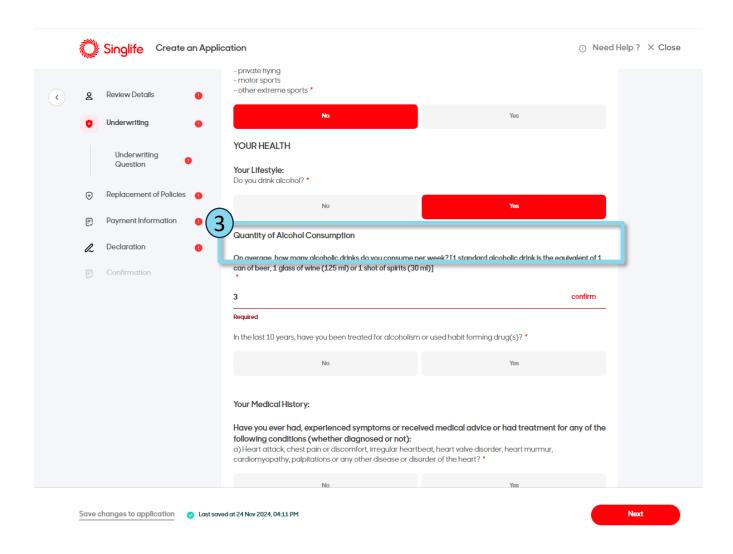




#### 4 Different types of UW qns:

- 1. Yes / No options
- 2. Dropdown list
  - Key in alphabet and dropdown will appear

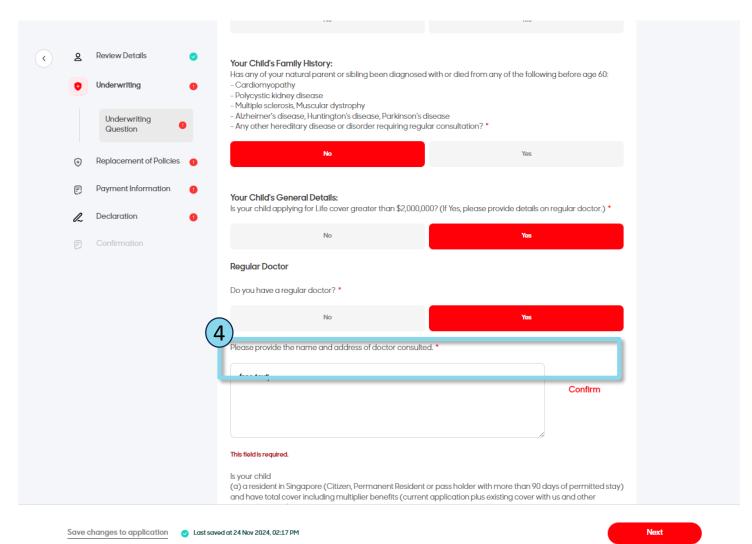




#### 4 Different types of UW qns:

- 1. Yes / No options
- 2. Dropdown list
  - Key in alphabet and dropdown will appear
- 3. Numerical inputs only





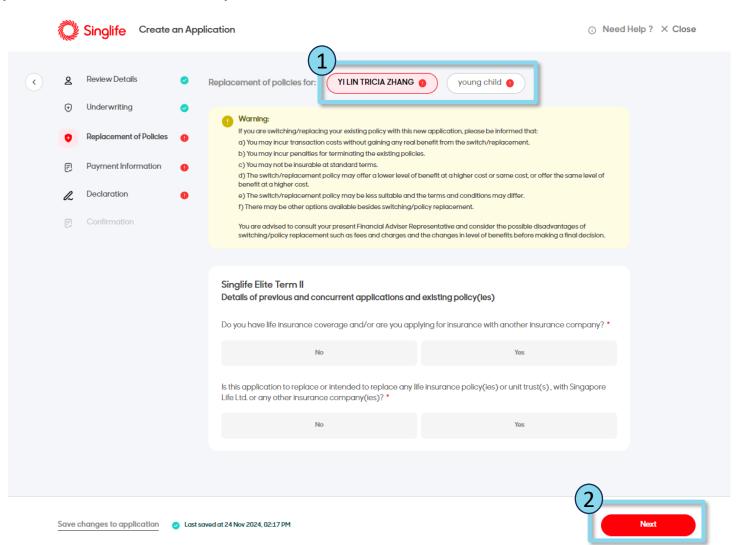
#### 4 Different types of UW qns:

- 1. Yes / No options
- 2. Dropdown list
  - Key in alphabet and dropdown will appear
- 3. Numerical inputs only
- 4. Free Text

24



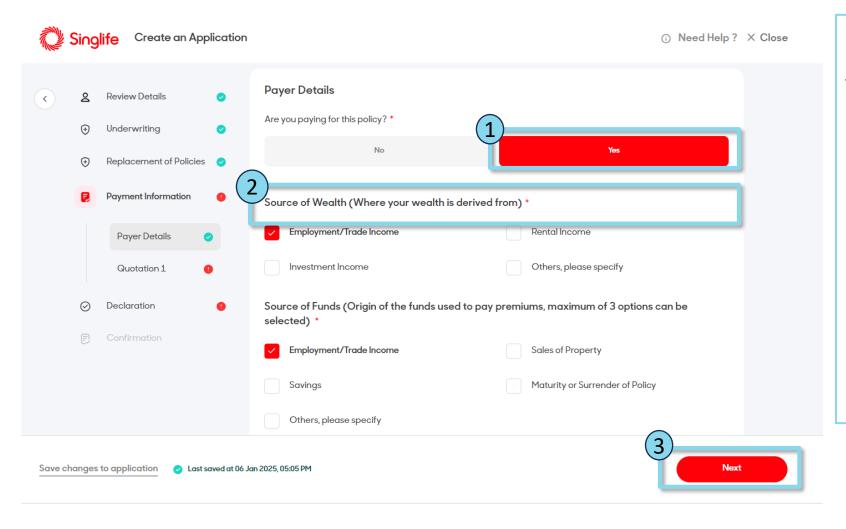
#### Replacement of policies



- Update questions for both Assured and Life Assured accordingly
- 2. Tap 'Next' to proceed



#### Payment Details

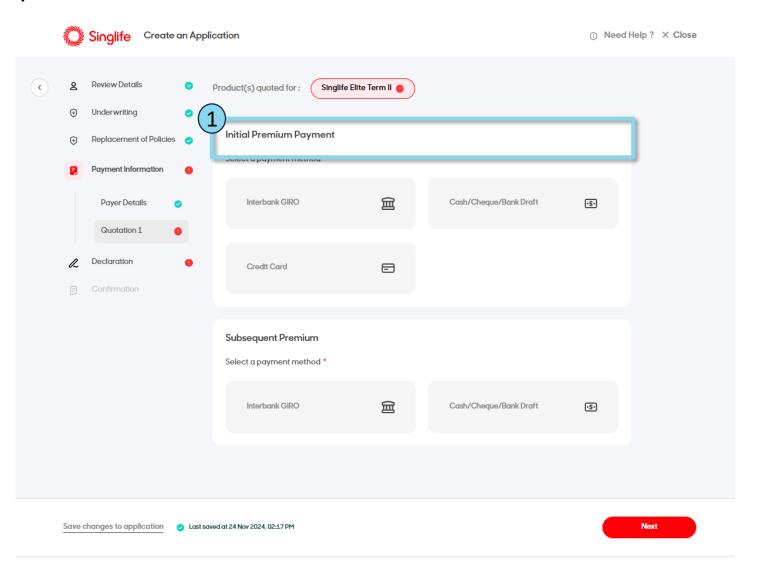


#### **Payment**

- Select 'Yes' if payer is Assured and/or Life Assured
- Update 'Source of Wealth' and 'Source of Funds' questions
- 3. Tap 'Next' to proceed



#### Payment Information – Assured or Life Assured



 Select payment method for 'Initial Premium Payment' and 'Subsequent Premium'

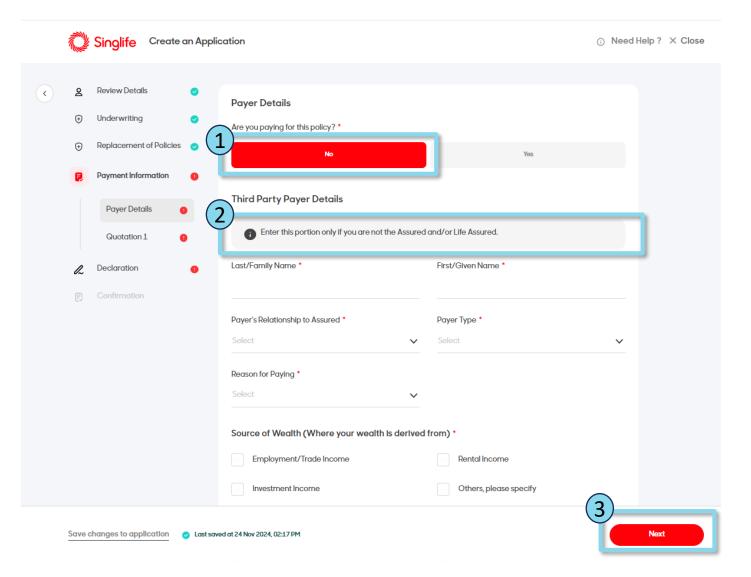
#### Note:

- EzSub will prompt fields accordingly
- By default, Payer = Life Assured
- Assured is automatically reflected for both Initial and Subsequent payment methods





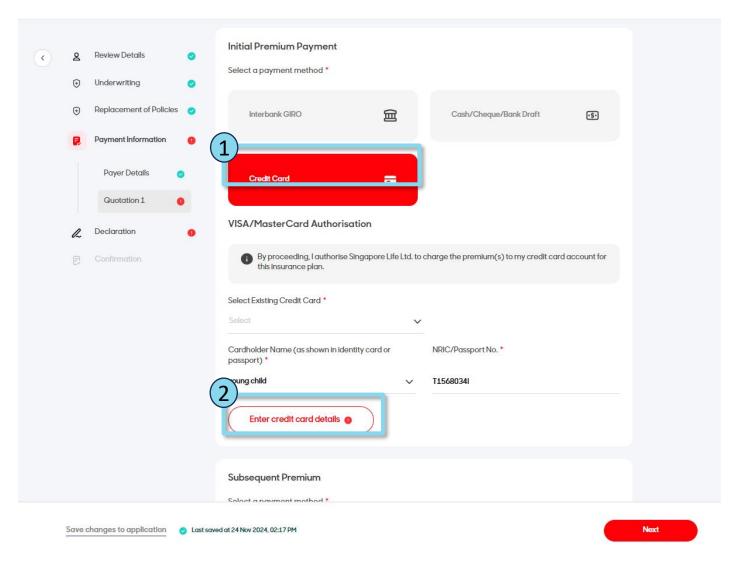
### Payment Details – Third party payer



- Select 'No' if payer is not Assured and/or Life Assured
- Update Third Party Payer details, 'Source of Wealth' and 'Source of Funds' questions
- Tap 'Next' to proceed



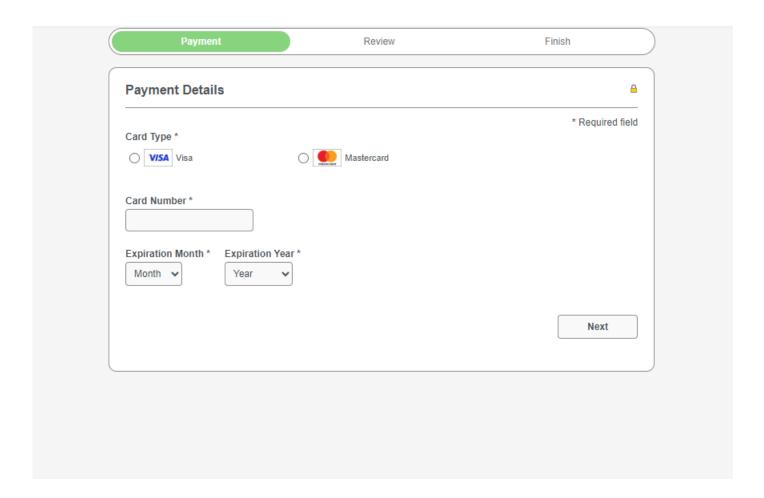
# Payment – Credit card



- 1. Select "Credit card"
- Tap "Enter Credit Card Details" to begin



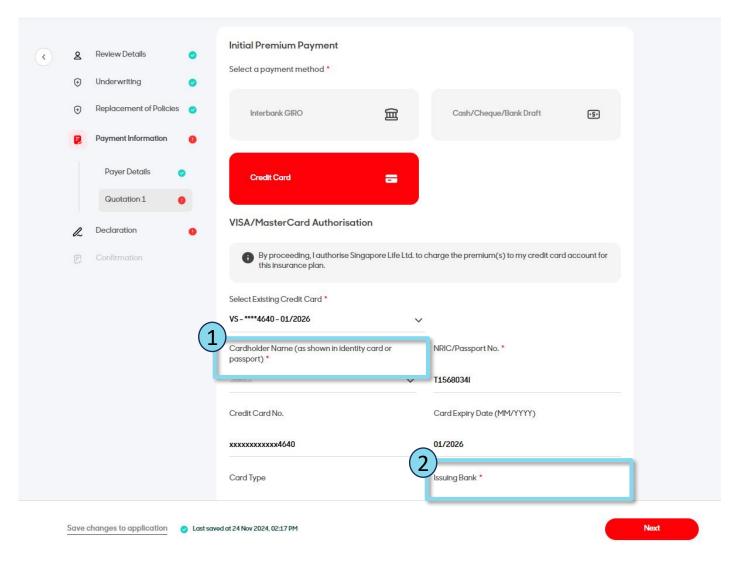
# Payment – Credit card



- Fill in Credit Card details
- Ensure Credit Card number is accurate
- CVV not required



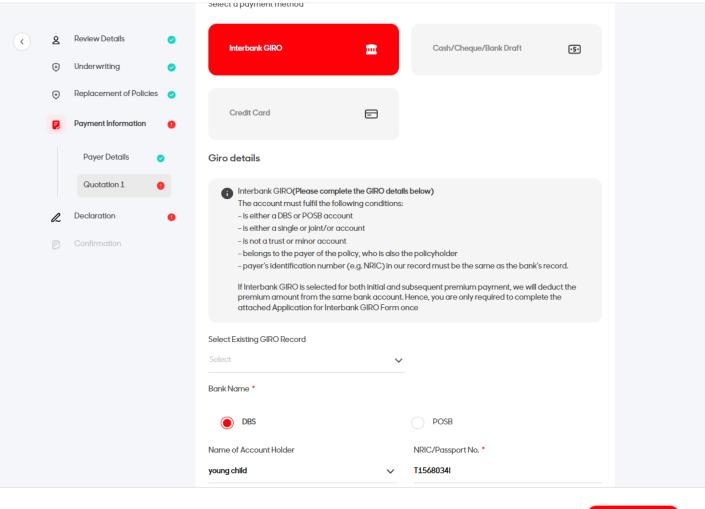
# Payment – Credit card



- 1. Update 'Cardholder Name'
- 2. Update 'Issuing Bank'



#### Payment – Interbank GIRO

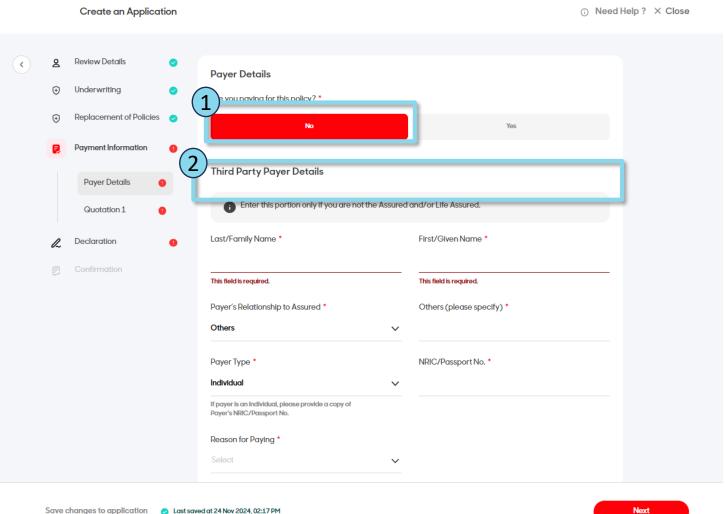


- DBS, POSB available for e-Giro
- Other banks = submit paper
   Giro form
  - <u>Life, health, savings and retirement</u> (singlife.com)

Next



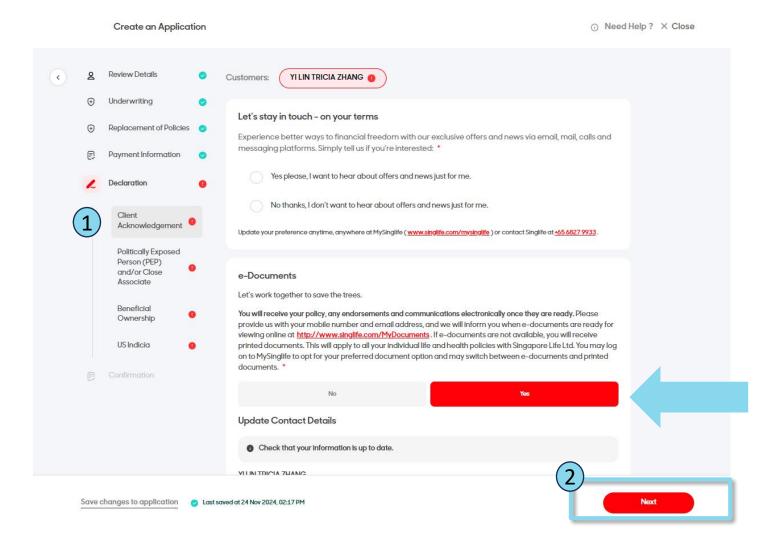
#### Payment – Two different Payers



- Select 'No' for Payer Details
- Answer all questions under 'Third Party Payer details'
- Choose cash/cheque for subsequent payment mode and follow-up with relevant docs



#### Declaration – Client Acknowledgement



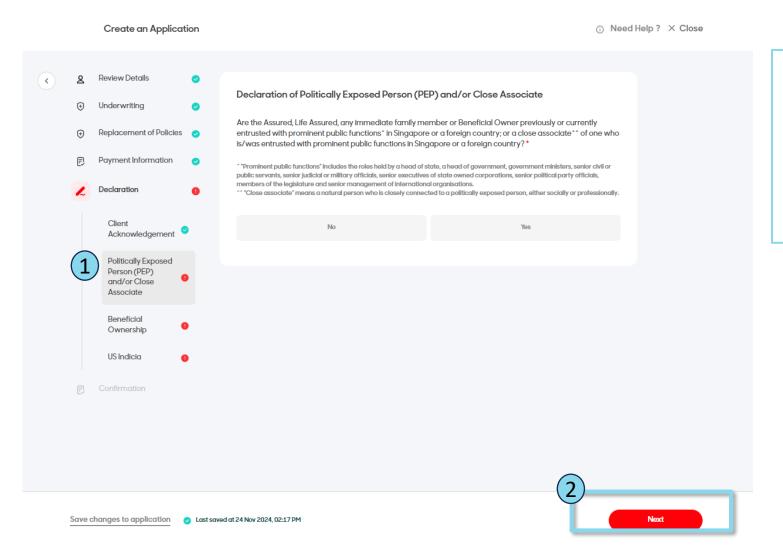
- All qns to be fully completed for to appear
- 2. Tap "Next" to proceed

#### **Note: e-Documents**

- Customers <62: default edoc
- Customers ≥ 62: default hard copy



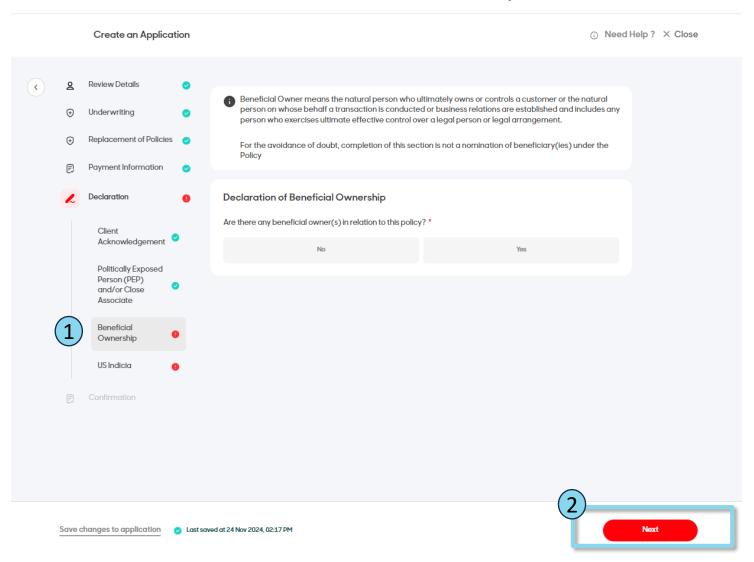
#### Declaration - PEP



- All questions to be fully completed for to appear
- Tap "Next" to proceed



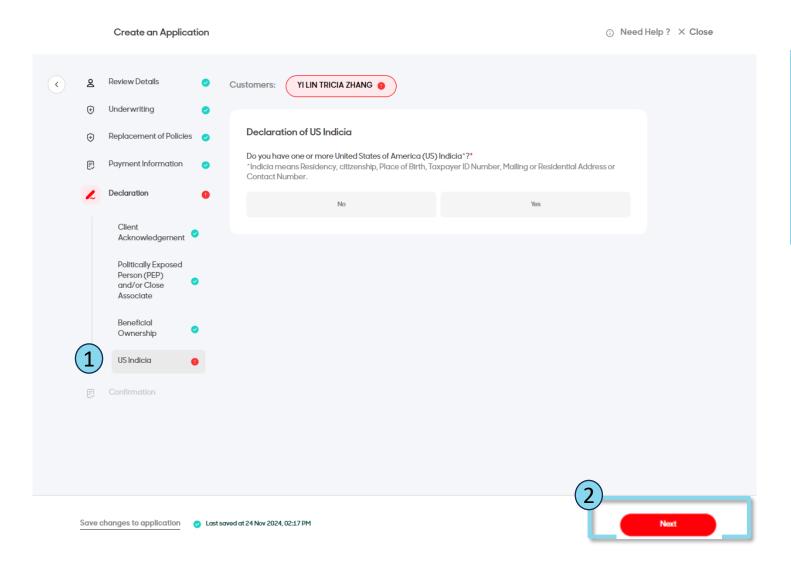
# Declaration – Beneficial Ownership



- All questions to be fully completed for to appear
- 2. Tap "Next" to proceed



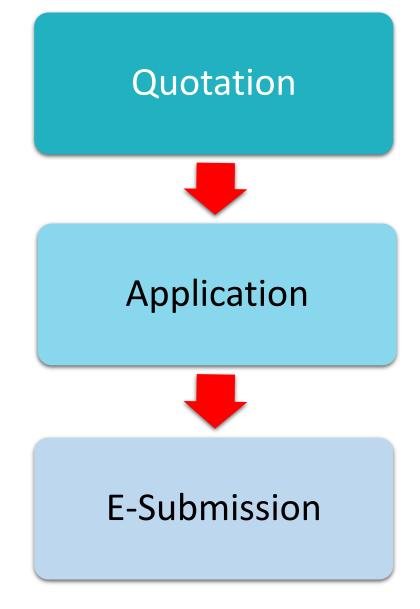
### Declaration – US Indicia



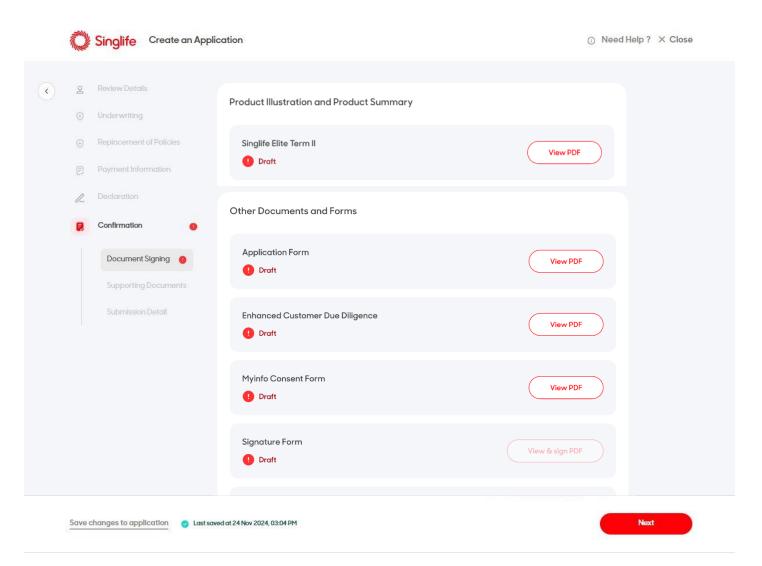
- All questions to be fully completed for to appear
- 2. Tap "Next" to proceed



# E-Submission Process







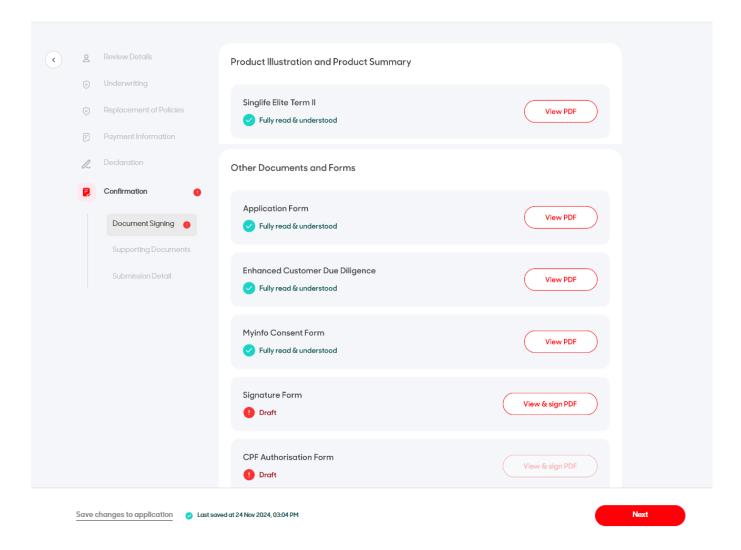
- Tap documents to review in sequence
- All forms are generated from responses in Application stage
- \*Myinfo Consent form is only generated when Myinfo option is used





- Tap on 'Done' once form is reviewed





Policy Illustration, Product
Summary, MyInfo consent form
& Application Form **must** be
reviewed completely before
Signature form appears

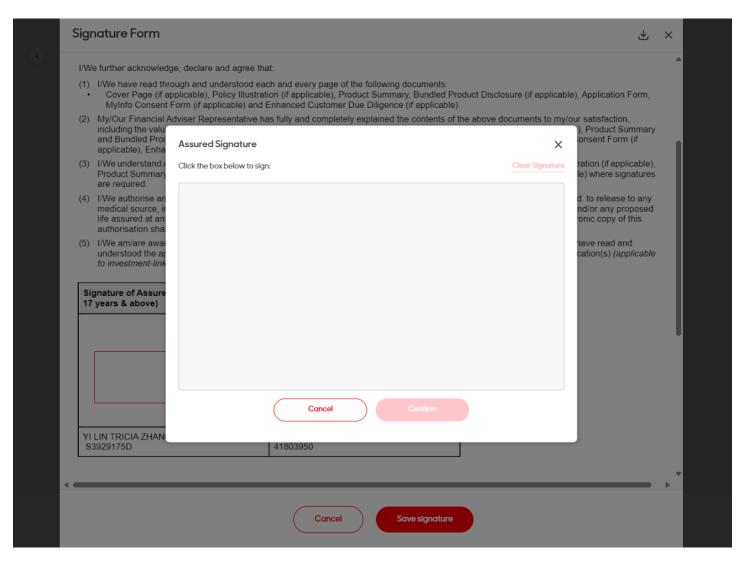
Tap on 'View & Sign PDF'



	e further acknowledge, declare and agree tha	at:	
(1)	Cover Page (if applicable), Policy Illustrati	ch and every page of the following documents: ion (if applicable), Product Summary, Bundled Product Disclosure (if applicable), Application Form, Enhanced Customer Due Diligence (if applicable).	
(2)	including the values/key benefits/premium ra and Bundled Product Disclosure (if applicab	as fully and completely explained the contents of the above documents to my/our satisfaction, ates/ information in the Cover Page (if applicable), Policy Illustration (if applicable), Product Summary ale), the declarations/requirements/information in the Application Form, MyInfo Consent Form (if tence (if applicable) and the pages I/we have to sign.	/
(3)		deemed to have signed all the pages of the Cover Page (if applicable), Policy Illustration (if applicable) Consent Form (if applicable) and Enhanced Customer Due Diligence (if applicable) where signatures	*
(4)	medical source, insurance office or organisa	ce office, or organisation to release to Singapore Life Ltd. and Singapore Life Ltd. to release to any ation, to the extent permitted by law, all relevant information concerning me/us and/or any proposed her the application(s) is accepted by Singapore Life Ltd. A photographic or electronic copy of this il.	
(5)		the respective Fund Prospectuses may be found on <a href="https://www.singlife.com">www.singlife.com</a> and l/we have read and ost recent edition of the respective Fund Prospectuses in relation to my/our application(s) (applicable).	9
	gnature of Assured (for age next birthday 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).	
l			
	LIN TRICIA ZHANG 3929175D	AGENT123 6000xxxx	

Tap on the 'Red box' to Sign

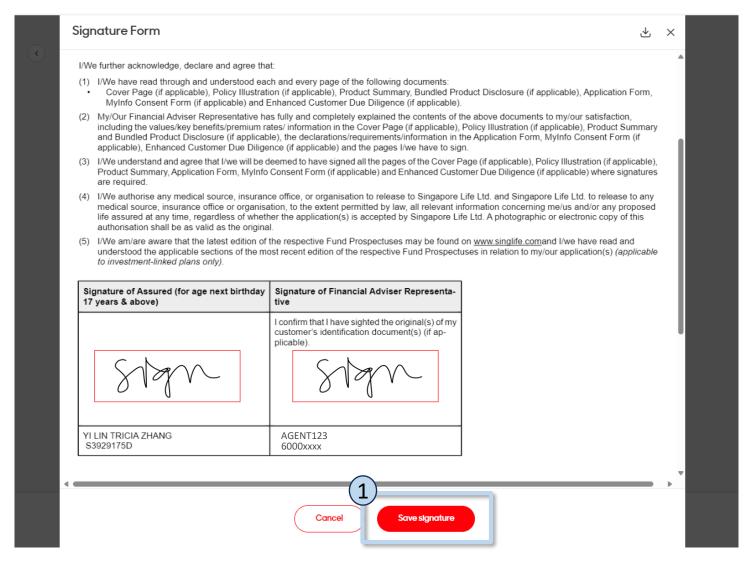




### Sign in the box

- "Clear Signature": erase signature and re-sign
- "Confirm": save signature



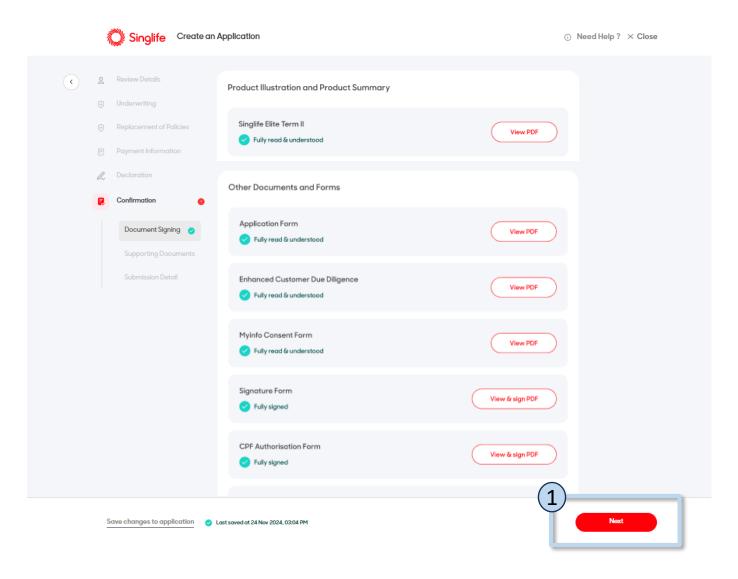


# Ensure signatures are all completed

**E-Submission** 

1. Tap on "Save signature"

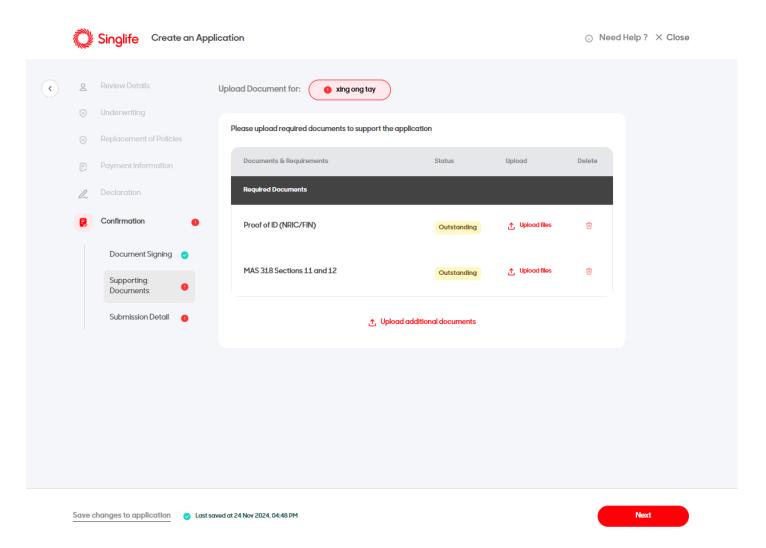




Signatures are valid for 30 days

 When fully completed, tap on "Next" to proceed

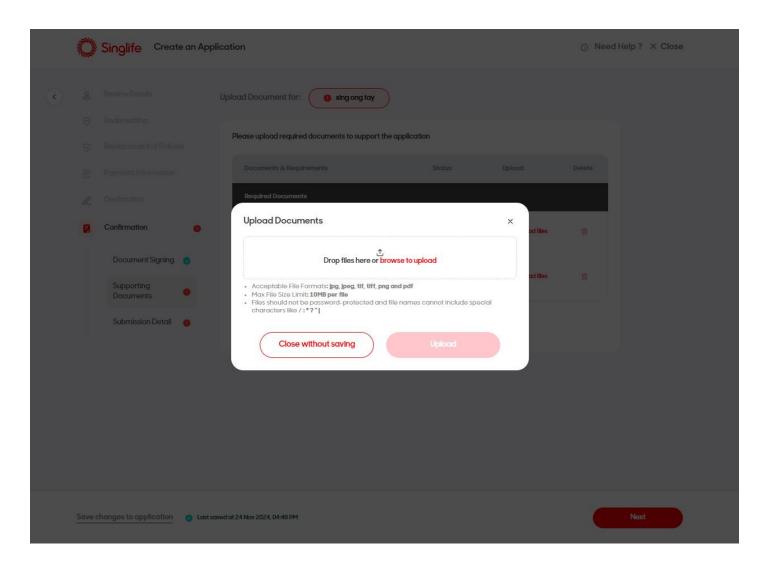




### **2 Mandatory documents:**

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

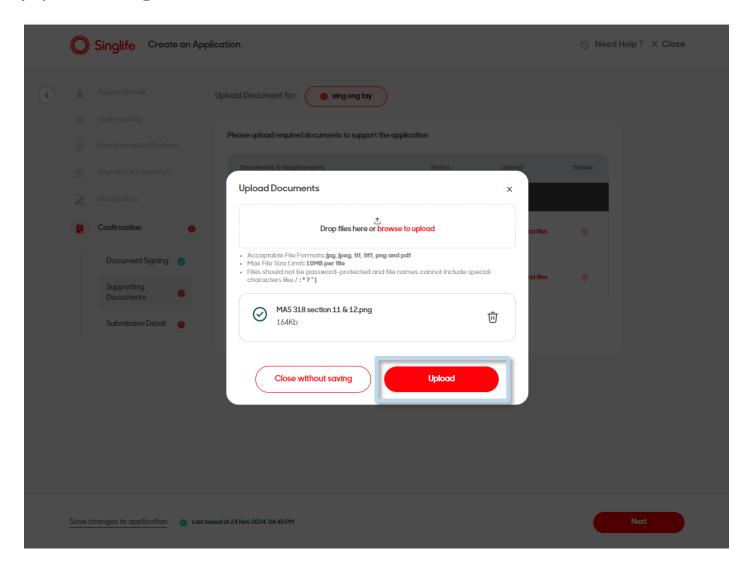




### **To attach documents:**

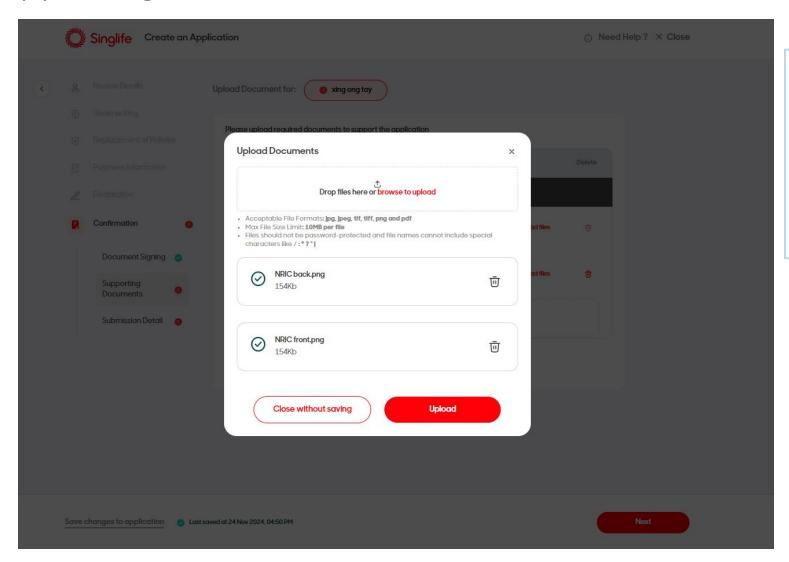
- Drag and drop files directly into the box
- Browse to upload documents from device





Once files have been successfully attached, tap 'Upload'

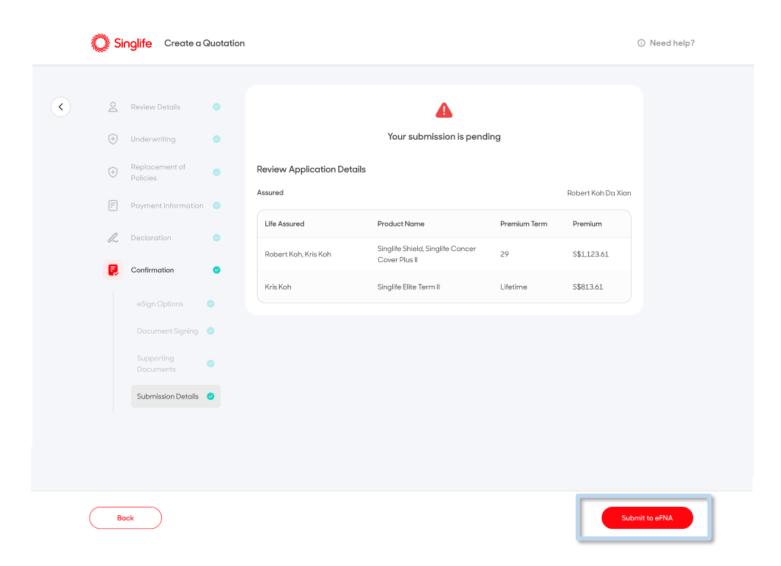




Attach multiple docs within the <a href="mailto:same"><u>same</u> category</a>
e.g. front and back of NRIC



### Submission Detail



Tap "Submit to eFNA" to return to Propel