

Corporate Solutions Compulsory Quote Request

Adviser Name



Incorporation Name

Eligibility Criteria¹ (who should be covered and when, e.g. "All staff on joining company")

| Group Life | Quote A | Quote B | Quote C | Quote D |
|--|---------|---------|---------|---------|
| Level of Cover (ie 3 x Salary or \$100,000 etc) | | | | |
| TPD Cover (none, full or reducing ²) | | | | |
| TPD Disability Definition (Any or Own Occupation ³) | | | | |
| Benefit Cessation Age (65 or 70) | | | | |
| Brokerage (0-20%) | | | | |

| Income Protection | Quote A | Quote B | Quote C | Quote D |
|---|---------|---------|---------|---------|
| Benefit Level | | | | |
| Wait Period (30, 60, 90 or 180 days) | | | | |
| Occupation type ((Own or Own/Any occupation) or (Own occupation or Two-Step)) ⁴ | | | | |
| Benefit Payment Period (1, 2, 5 years, or to age 65) | | | | |
| Brokerage (0-20%) | | | | |

| Critical Conditions | Quote A | Quote B | Quote C | Quote D |
|---|---------|---------|---------|---------|
| Level of Cover (ie 1 x Salary or \$50,000 etc) | | | | |
| Policy Type (Stand Alone or Accelerated ⁵) | | | | |
| Benefit Cessation Age (65 or 70) | | | | |
| Brokerage (0-20%) | | | | |

Currently Insured? YES NO If yes, provide details

Claims History⁶

Comments / Categories⁷

Notes

1. Please take note of our standard eligibility criteria below, which can be found in our policy wordings. If you wish to make changes to this criterion (for example, minimum hours or set employer tenure requirements), please list them in the allocated box. *E.g. Senior Managers who work at least 20 hours per week.*

Eligible Member

An individual who:

- is in the service of the Employer; and
- is under the maximum entry age as set out in the Policy Schedule; and
- is Gainfully and Permanently Employed for at least fifteen (15) hours per week (each and every normal working week); and
- is a New Zealand citizen, permanent resident or holds a current New Zealand work visa, issued for a period not less than twelve (12) months and resides in New Zealand; and
- meets the eligibility criteria specified in the Policy Schedule.

- Reducing TPD means in the last 5 years before the cessation age the cover reduces by 20% every year. *E.g. \$100,000 life cover for All employees reducing to Age 65. \$100,000 16-59 then \$80,000 at age 60, \$60,000 at age 61, etc until the cessation age of 65.*
- Any Occupation may be the only option offered at our discretion and TPD may not be available for all schemes.
- Benefit Payment Period of 1 and 2 years will automatically result in Own occupation.
- Accelerated Critical Conditions may only be provided with Life Cover of equal or higher benefit amounts.
- Please provide 5 years of claims history if the scheme has recently been or currently is in force.
- Please advise any information you are aware of which may influence our decision as to whether we prepare a quote or not, or the terms of our quote. If you would like multiple categories for different staff criteria please contact your BDM to help you complete this form. *E.g. all managers \$500,000 Life and all other staff \$200,000 Life.*

Please allow 5-10 working days for completion and return - depending on complexity.

AIA House,
74 Taharoto Road,
Takapuna,
Auckland 0622

Private Bag 92499,
Victoria Street West,
Auckland 1142

Freephone: 0800 500 108
Email: nz.corporatesolutions@aia.com
Web: aia.co.nz/corporate



X00190-016A-2207