

Adviser Online

Your AMP planner website "Adviser Online" is the primary communication channel to stay up-to-date with AMP's product and service developments.

Managing your AMP clients couldn't be easier with Adviser Online. With one click you can access:

- Information you need to manage your New Business applications.
- Outstanding requirements on your current New Business applications.
- Urgent statements AMP have forwarded to your client.
- Ten most recently viewed clients.
- Client's AMP portfolio.
- Change of client address.
- And loads more...

Navigation tabs

- **Clients** – search and view new clients. Produce client reports and manage transactions.
- **Business reports** – create reports by product and Funds Under Management.
- **Resources** – provide you with shortcuts to the resources section of Adviser Online.

Client transactions

The transaction summary shows the most recent open service requests, and the most recent outstandings.

Recently viewed clients

The last 10 clients that you have accessed will be displayed in this section where icons will allow you to quickly identify the type of client – individual client, household and company. This allows quick access to the clients Portfolio Summary or the Personal Details without having to do a search.

What you need to know

The information in this brochure is for Planner use only and is not suitable for distribution to your clients. The information in this brochure is provided by AMP Life Limited ABN 84 079 300 379 and is of a general nature only. Before relying on any advice in this document planners should consider the appropriateness of the advice with regard to their client's particular objectives, financial situation and needs. Before acquiring any AMP product your client should read the product disclosure statement.

Resources

The resources section shows shortcuts to AMP's product and service information, including technical and marketing support to help you grow your business.

Quick links

This section provides you with links to the Product and Process Centre – where you can find more information on AMP's products.

Changing your practice filter

Your practice can gain access to the practice view which allows you, or someone in your practice, to access information on all clients across the practice. To apply a practice or planner filter (dependant on the user security profile), select **Change** at the top of the screen.

Where to go for more information?

More information is available on Adviser Online in the Quick Reference Guide or you can take a quick online tour through the new functionality available on Adviser Online.

Adviser Technology phone: 1300 133 423 or adtech@amp.com.au.

What if I can't access Adviser Online?

AMP must have an active agreement with your Dealer group to provide you with an Adviser Code. If you have an Adviser Code but no password you can contact the AdTech Support Centre by emailing adtech@amp.com.au.

If you require an Adviser Code please email Distribution_Records@amp.com.au.

Contact us

To find out more about how *easyldodge* and *easywrite* can make a difference to your business logon to Adviser Online or contact your AMP Wealth Protection Business Development team.

Phone: 1300 785 066 (option 5)

Web: www.adviseronline.amp.com.au



Doing business with AMP just got easier

Submitting applications for Flexible Lifetime® Solutions business is now even easier with the introduction of *easyldodge*, new electronic form lodgement, *easywrite*, automated underwriting, and a new and improved method to access your outstandings and client information.

These changes are designed to make your practice more efficient, lower the cost to serve your clients and provide you with maximum choice and flexibility regarding how you can best integrate new systems and product enhancements into your day-to-day operations.

easyldodge

Introduces a new system for the submission of Flexible Lifetime Solutions application forms into AMP.

easyldodge benefits

- Client information is transferred from Adviser Online directly into the application form.
- Enter information once and key details pre-populate additional forms and *easywrite*, if required.
- Complete new retail business applications online, when with a client, and provide a policy number on the spot.
- *easyldodge* guides you through each online application form, immediately highlighting mandatory fields and any errors in data entry.
- Submit your applications online then track through Adviser Online.
- Reduce client waiting times – AMP Customer Service receives your new business applications faster, the processing times are faster.
- Collect clients' signatures using the new electronic signature pad and reduce paperwork while protecting your clients' privacy and security.

Two *easyldodge* options

1. **Online lodgement with electronic signature** (full electronic) – the most efficient process. Forms are submitted directly to AMP customer service, enabling straight through processing in most instances, or immediate referral to a customer service representative for processing.
2. **Online lodgement with handwritten signature** (partial electronic) – complete the form online with your client, print off and ask your client to sign, scan and attach online for a paperless option, or mail or fax to AMP customer service.

You can access *easyldodge* via Adviser Online, your AMP planner website.

easywrite

Provides automated underwriting, for risk insurance products, via 2 options:

- *easywrite* tele, a telephone Personal Statement service, where a specially trained AMP call centre representative collects the information from the client on your behalf.
- *easywrite* office – automated underwriting online in your office when with a client. The client knows immediately whether they have cover or if their application has been referred to underwriting for review.

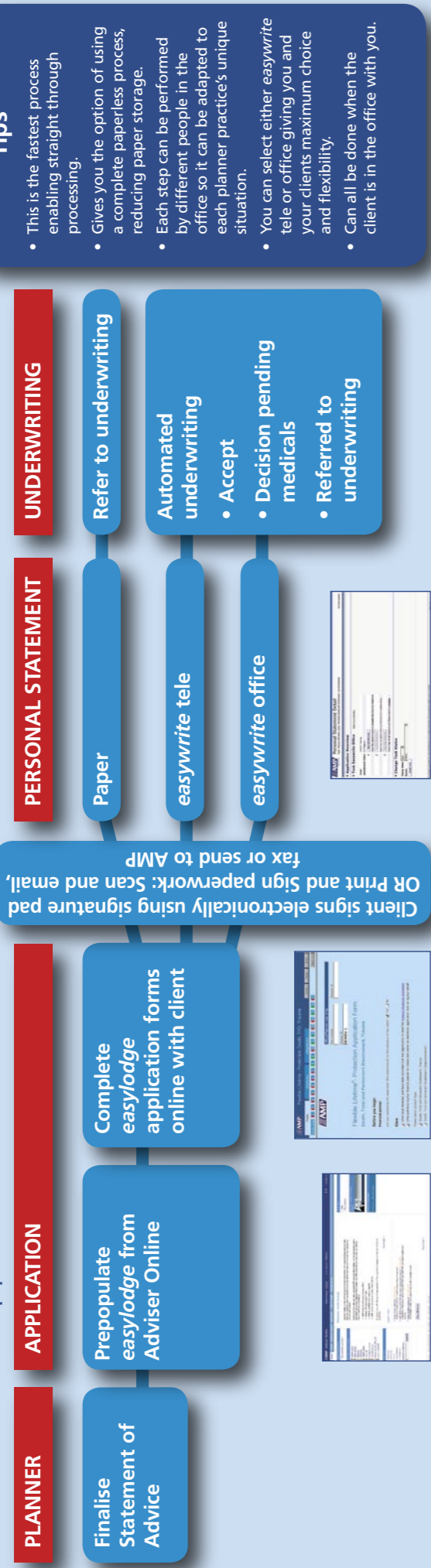
easywrite benefits

- Up to 30% of cases are expected to be accepted without having to go to an underwriter, you can provide cover to your clients there and then.
- Reduced cycle times and costs for the remainder of cases due to the quality and completeness of information.
- Guaranteed consistency with underwriting decisions that are accepted immediately.
- Personal Statements completed using *easywrite* are submitted immediately to AMP underwriting for review when attention is required.
- Additional commission of 17.27% (including GST) on risk business sold using *easywrite*, all you have to do is ensure you add the extra commission amount on the Statement of Advice.
- Reduction in your compliance pressures with *easywrite* tele as AMP records the client Personal Statement interview assuming responsibility for client disclosure.

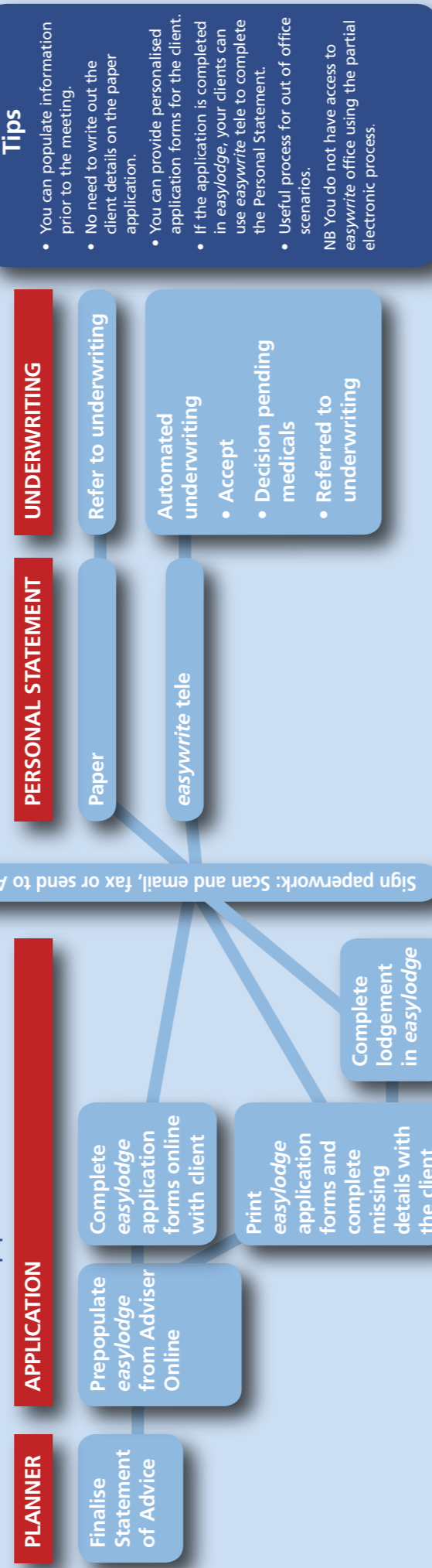


Flexible application options for your business

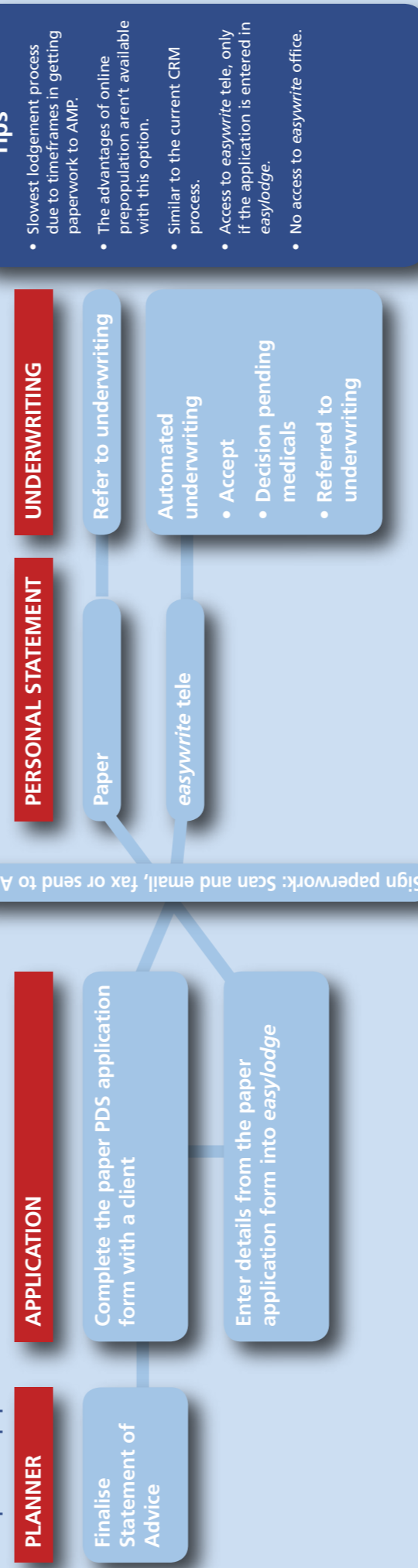
Full electronic application



Partial electronic application



Paper application



Easy steps to use *easy/odge* and *easywrite*

