



Zurich's enhanced tele-underwriting service.

Save up to 4 hours per case
and take your business to
places you never dreamed.

Your time is valuable

In today's rapidly changing market, it's more important than ever to focus on your core value proposition. How do you add the most value to your clients and to your business?

As a highly specialised professional adviser, your time is valuable. And your core value-add is in the provision of quality advice – not in the completion of personal statements and other paperwork.

The answer is simple; let Zurich's tele-underwriting team do it all for you.

Our team of dedicated specialists can complete the personal statement – including medical and financial questions – over the phone with your client, at a time convenient to them.

So is your client's

Tele-underwriting can help speed up the entire application process, by ensuring questions are completed more accurately, and by reducing the need for extra paper-based questionnaires. Plus Zurich can help gather the extra requirements, helping turn a three to four week timeframe into a one week process in the majority of cases where extra details are needed.

It's also a lot more convenient for your clients; they can choose when and where they take the call, often choosing to be at home, which improves their ability to access medical and financial information that may be required.

It's a service that can also come in handy with clients who:

- live in regional or remote areas; or
- are time poor; or
- are sensitive about when and to whom they disclose their medical and financial details.

Don't take our word for it

Chris Southgate, successful financial planner, past AFA Rising Star and mountaineer, has been using Zurich's tele-underwriting service for 100% – yes 100% – of his Zurich risk applications for more than three years.

"I mainly specialise in medical professionals, who are extremely time poor, and so being able to shorten the average appointment time by at least half is a huge bonus for them and me" said Chris. "It actually removes a barrier to them meeting me in the first place."

There are other advantages to using the service too, as Chris explains:

"I find they ask the right questions, and gather the correct amount of detail, so it alleviates the non-disclosure concerns an adviser sometimes has. They also look after financials as well as health questions, plus they do all the follow-ups."

By saving up to 4 hours per application, Chris has not only been able to spend more time with his clients, but also more time enjoying his personal passion – mountaineering.



What's 4 hours of your time worth?



For more details on how Zurich's tele-underwriting service can help put your business in the express lane, ask your Zurich risk specialist BDM, or check out our short video, by scanning the code to the left or visiting youtube.com/zurichaustralia