

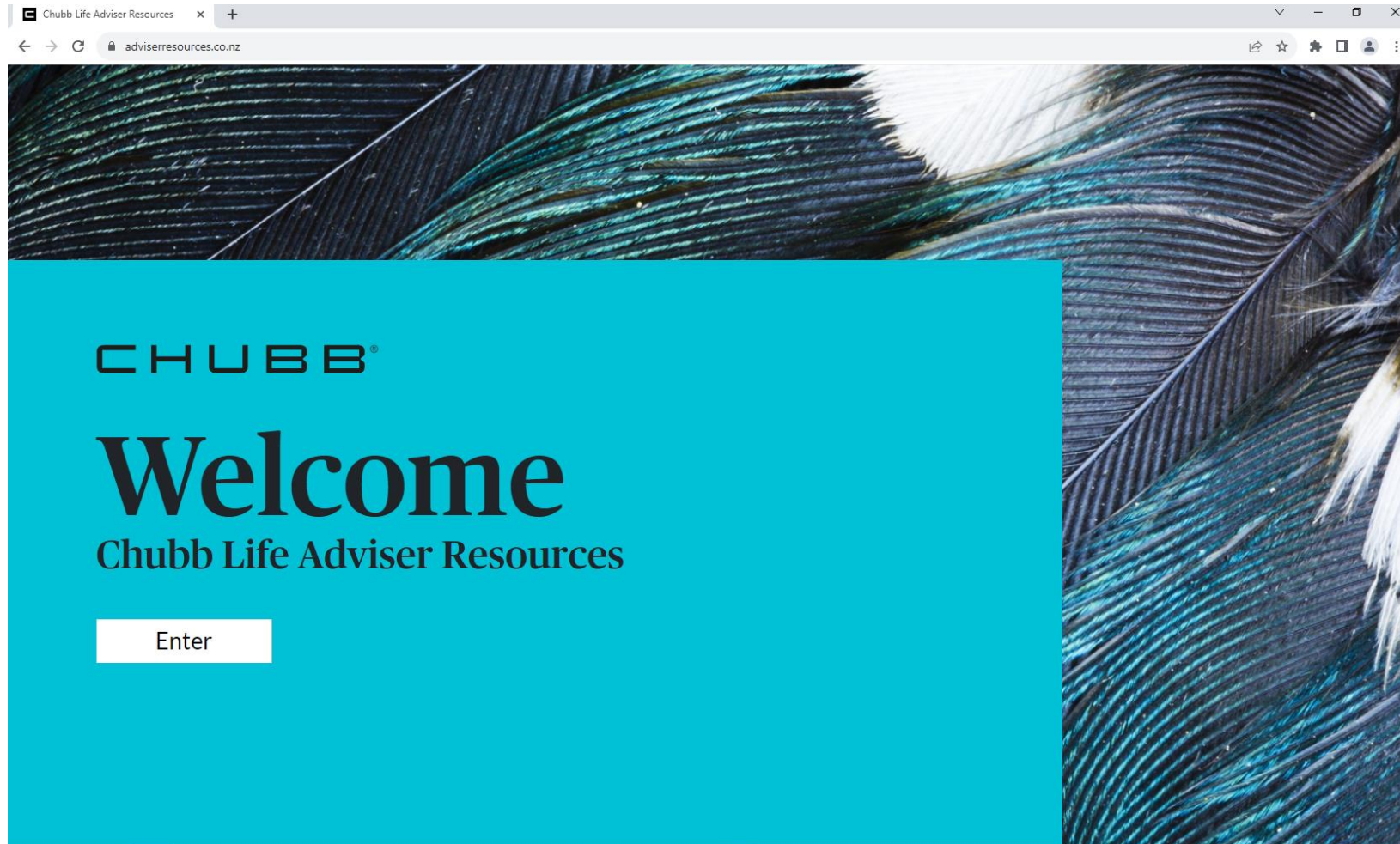
CHUBB®

Adviser Resources

30 AUGUST 2023



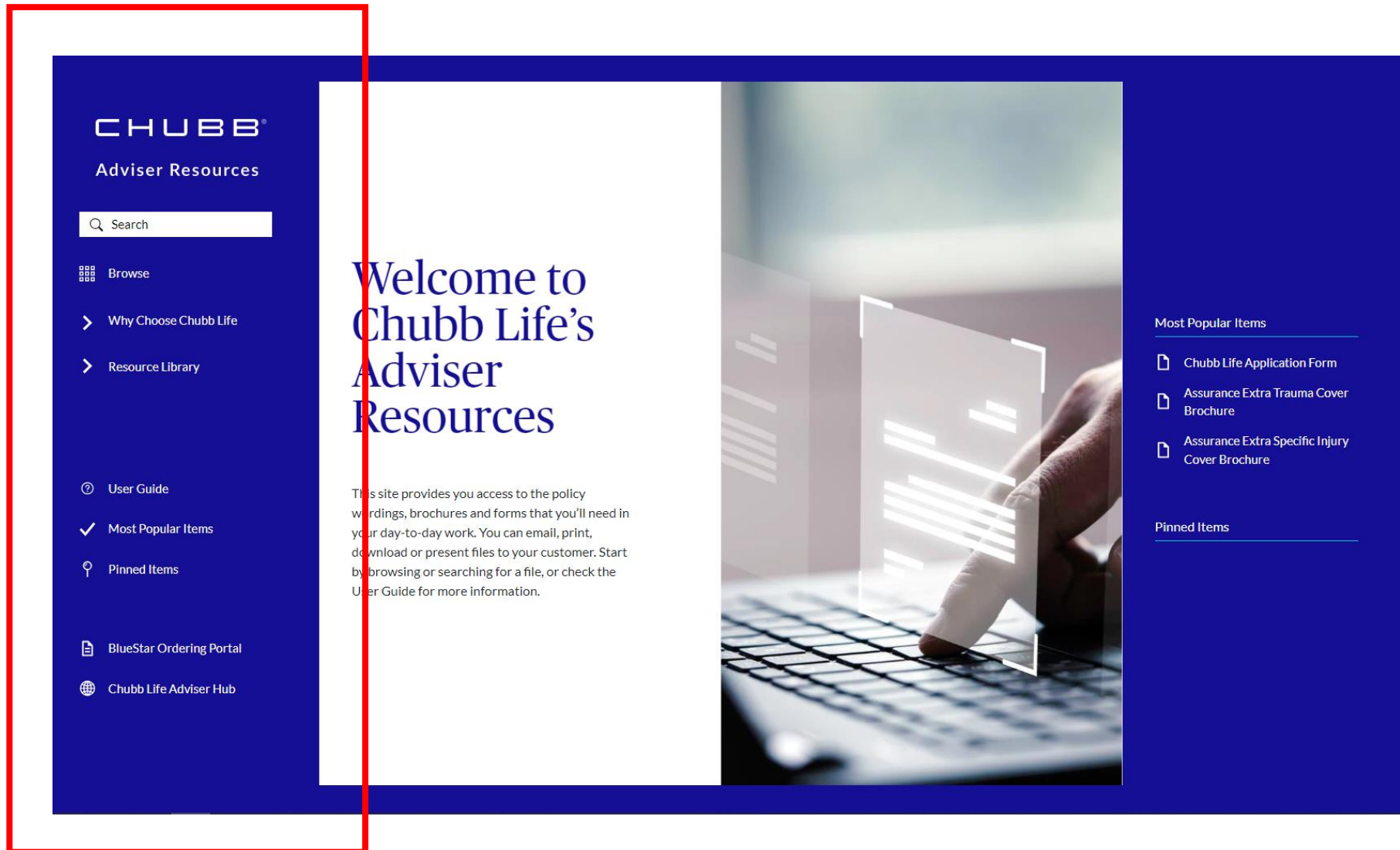
Welcome to Chubb Life's Adviser Resources site



Launched earlier this year, this site is a one stop shop for all of our brochures, policy wordings and forms.

You can access the site directly by visiting adviserresources.co.nz or from the link in the resource section of Adviser Hub.

Navigating between sections



When you enter the first thing you'll notice is the menu bar on the left hand side.

This will be visible on every page of the site and will help you move between the sections.

Browsing the site

The screenshot displays the Chubb Adviser Resources website. On the left is a dark blue navigation sidebar with the Chubb logo and 'Adviser Resources' text. It includes a search bar, a 'Browse' button (highlighted with a red box), a 'Why Choose Chubb Life' link, a 'Resource Library' dropdown menu (also highlighted with a red box) containing 'Brochures', 'Policy Wordings', and 'Forms', and other links like 'User Guide', 'Most Popular Items', 'Pinned Items', 'BlueStar Ordering Portal', and 'Chubb Life Adviser Hub'. The main content area is white and titled 'Browse'. It features four columns of links under the following headings: 'Brochures' (Assurance Extra, Assurance Extra Business, General, Why Chubb Life), 'Policy Wordings' (Assurance Extra, Assurance Extra Business), 'Forms' (Application Forms, Underwriting Forms, Claims Forms & Guides, Other Forms), and 'Most Popular Items' (Chubb Life Application Form, Assurance Extra Trauma Cover Brochure, Assurance Extra Specific Injury Cover Brochure).

To navigate the site you have the following options:

- Click browse to see all sections
- Open up the resource library menu and click on the folder you need
- Use the search function.

Making the most of search

The screenshot displays the Chubb Adviser Resources search interface. On the left, a dark blue sidebar contains the Chubb logo and 'Adviser Resources' text. Below this, a search bar is highlighted with a red rectangle and contains the text 'business'. The main content area, titled 'Search Results for 'business'', shows a grid of search results. Each result includes a thumbnail image, a title, and a set of icons for search, add, print, and download. The results include:

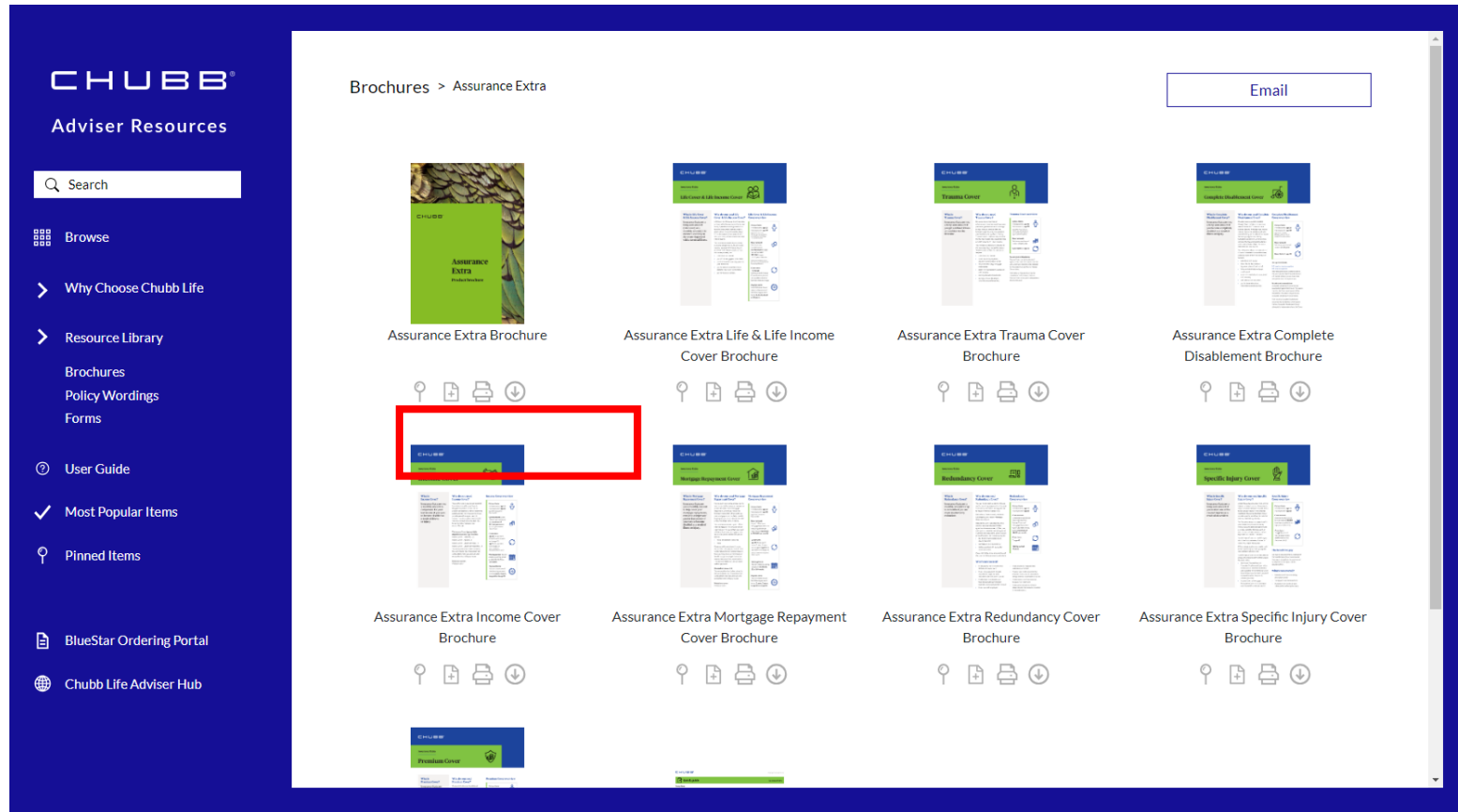
- Business Product Conversion Application Form
- Business Extra Financial Review Form
- Assurance Extra Business Policy Wording Sample
- Assurance Extra Business Life Cover Sample
- Assurance Extra Business Trauma Cover Sample
- Assurance Extra Business Complete Disablement Cover Sample
- Assurance Extra Business Specific Injury Cover Sample
- Assurance Extra Business Monthly Disability Cover Sample
- Start-Up Monthly Disability Cover
- Precision Cover
- Monthly Disability Cover
- Complex Disablement Cover

An 'Email' button is visible in the top right corner of the search results area.

The search function doesn't require a complete match to work.

For example a quick search of the word business will bring up all of the forms, policy wordings and brochures that relate to our Assurance Extra Business product.

Under your thumb



Underneath each thumbnail there are four icons.

- Pin – When you hit this the pin turns red and the document is saved to your pinned items list (accessed from the main menu). This makes it quicker to access the items you use regularly.
- Attach– This attaches a copy of the document to an email.
- Print– this prints a document directly from the thumbnail view without opening it up.
- Download - This will download a copy of the document which you can save to your computer

Sending attachments

The screenshot displays the Chubb Adviser Resources interface. On the left is a dark blue sidebar with the Chubb logo and navigation options: Search, Browse, Why Choose Chubb Life, Resource Library (with sub-items: Brochures, Policy Wordings, Forms), User Guide, Most Popular Items, Pinned Items, BlueStar Ordering Portal, and Chubb Life Adviser Hub. The main content area is titled 'Policy Wordings > Assurance Extra' and shows a grid of document thumbnails. Each thumbnail includes a title, a 'SAMPLE' watermark, and a set of icons for pinning, adding, printing, and downloading. A red rectangular box highlights the 'Email (2)' button located in the top right corner of the main content area.

When you hit the attach icon it adds that document to an email, you can add as many documents as you like from different sections of the site.

As you hit that attach button you will see the number increasing next to the email button at the top right of the screen.

When you are ready to send hit that email button.

Emailing your customers

The screenshot shows an 'Email' form with the following fields and sections:

- Email:** Enter emails here separated by commas
- CC Sender:** Enter cc emails here separated by commas (highlighted with a red box)
- Subject:** Enter subject here
- Message:** A rich text editor with a menu (File, Edit, View, Insert, Format) and a toolbar (undo, redo, Paragraph, Bold, Italic, etc.).
- Attachments:** A list of attached files (highlighted with a red box):

Attachment Name	Action
Assurance Extra Brochure	X
Assurance Extra Policy Document Sample	X

At the bottom of the form are 'Cancel' and 'Submit' buttons.

The email form will pop up in a separate window. Enter the email of your recipient, your subject line and message.

Make sure to enter your own email address in the cc Sender field. This ensures you are copied into the email and that the customer knows who to direct any replies to.

You can see the documents you have attached at the bottom of the email and can click the cross next to a document if you need to remove it.

Once you are happy hit submit and you will get a message to say the email has been successfully sent.

The big picture

The screenshot displays the Chubb Adviser Resources interface. On the left is a dark blue sidebar with the Chubb logo and navigation options: Search, Browse, Why Choose Chubb Life, Resource Library (with sub-items: Brochures, Policy Wordings, Forms), User Guide, Most Popular Items, Pinned Items, BlueStar Ordering Portal, and Chubb Life Adviser Hub. The main content area shows a breadcrumb trail 'Brochures > Assurance Extra' and the document title 'Assurance Extra Brochure'. Above the document is a toolbar with 'Pin', 'Send', 'Print', and 'Download' buttons. The document itself is a PDF thumbnail with a green cover that reads 'CHUBB Assurance Extra Product brochure'. At the bottom of the viewer, a navigation bar contains a red Adobe PDF icon, left and right arrows, a page indicator '1 of 6', and a full-screen icon (two arrows pointing outwards) which is highlighted with a red square. A search icon and a three-dot menu icon are also visible on the right side of the navigation bar.

To view a document online just click the thumbnail image. This will open it up in a viewer.

Clicking the two arrows at the bottom makes the document full screen.

Heading home again

Assurance Extra Brochure PDF

A summary of Assurance Extra

You've worked hard to get where you are today and along the way you are likely to have come to appreciate a number of areas in your life that are important to you, such as your family, your income, your home, your health and your lifestyle.

But what if the unexpected should happen – how can you protect the things you value? This is why insurance is so important.

Protecting what's important to you

There are a number of insurance solutions that protect your life and lifestyle against illness, injury and death. These insurances are often referred to as life and living insurances. These days it's important to consider a combination of life and living insurances to ensure you are protected against any of life's many challenges that may come your way.

We have a full range of insurance solutions to help you protect what's important, so you can get on with living life to the full.

What is Assurance Extra?

Assurance Extra is a master policy for your personal life and living insurance needs. It offers nine different covers, which you can choose from to suit your needs and budget.

The covers include:

- Life Cover & Life Income Cover
- Trauma Cover
- Complete Disablement Cover
- Income Cover
- Mortgage Repayment Cover
- Redundancy Cover
- Specific Injury Cover
- Premium Cover

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- Single-page view
- Two-page view ✓
- Show cover page
- Zoom to page level
- Fit to width ✓
- Full screen

Once you're in full screen you will see a menu at the bottom right which gives options for displaying and moving through the document as you wish.

When you're finished just click the cross in the top right to return to the site.

Some additional helping hands

CHUBB®
Adviser Resources

Search

Browse

> Why Choose Chubb Life

> Resource Library

📖 User Guide

✓ Most Popular Items

📌 Pinned Items

📄 BlueStar Ordering Portal

🌐 Chubb Life Adviser Hub

Welcome to Chubb Life's Adviser Resources

This site provides you access to the policy wordings, brochures and forms that you'll need in your day-to-day work. You can email, print, download or present files to your customer. Start by browsing or searching for a file, or check the User Guide for more information.

Most Popular Items

- 📄 Chubb Life Application Form
- 📄 Assurance Extra Trauma Cover Brochure
- 📄 Assurance Extra Specific Injury Cover Brochure

Pinned Items

Coming back to the main screen. At the bottom of the menu there are links to our Adviser Hub and to the BlueStar ordering portal.

If you get stuck at any point or need some extra help, the user guide explains everything we've covered and more.

Questions or feedback

sarah.prowton@chubb.com



How useful would it be to use adviser resources on your mobile phone?

- 1. Not useful at all
- 2
- 3
- 4
- 5 Very Useful



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