CHUBB®

Quote for Alteration

Quick Reference Guide

This guide helps you quickly complete the following functions:

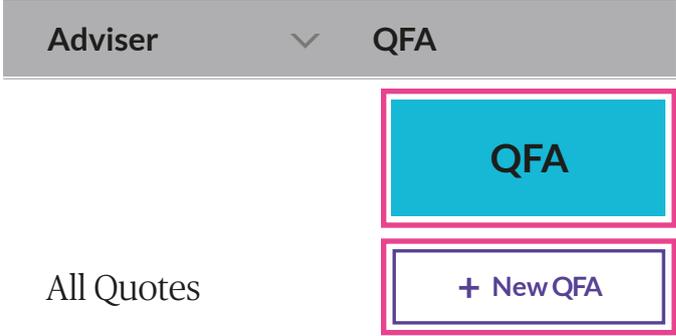• Reducing a Sum Insured • Removing a Benefit • Removing a Life Assured

1 **Accessing Policies**

› Use the Policy Search tab, enter the policy number or customer name.

› Eligible policies show the blue QFA button.

› Click on New QFA.

Tip:
Only the servicing adviser can view existing policies. Ineligible policies show a greyed-out button.

Adviser ⌄	QFA

QFA

All Quotes   **+ New QFA**

2 **Reducing a Sum Insured**

› Expand the benefit to view details.

› Enter the reduced sum insured (original and new values are shown including the revised premium).

› Reset or save progress as needed; add comments to identify scenarios.

Tip:
Increasing the sum insured or reducing below required levels
will trigger an error. Contact Chubb New Business Team for further support.

QFA Tool

Policy details ⋮

Policy: 123456
Product: Assurance Extra
Policy Fee: $1.50

Coverage Details

Please ensure that the below information is correct.

🛡 Life Cover   In Force ⌃

Current Sum Insured*   Premium
$689,000.00 $23.70
Original sum insured: $700,000.00   Original premium: $24.01

Premium Review Period   Indexation   Smoker?
To Age 80 ⌄   No ⌄   No ⌄

Occupation Class   Lifetime Reward
2 ⌄   15%

⊗ GIO   ⊗ Underwriting Terms

🗑 Remove Cover

Total Premium
$107.39 per week   View breakdown & Payment Frequency

💾 Save Progress   Return to Dashboard

3 Removing a Benefit

› Expand the benefit and click "Remove Cover."

› Confirm the removal; a confirmation message will display.

  – Reset or save progress.

1. Expand Benefit

2. When clicked you will be asked to confirm your decision to remove the cover:

Remove Trauma - Standalone

Are you sure you want to remove this coverage from Customer 1?

Cancel   Remove

3. A message will display at the top of the quote confirming the removed:

CHUBB | QFA

QFA Tool

✓ Trauma - Standalone has been removed successfully.

4 Removing a Life Assured

› Use the ellipses menu to select and confirm the life to remove.

› Cannot remove the last life insured—this requires a cancellation request.

› Additional messaging appears if children with Child Trauma Coverage are affected.

1. Select Customer to remove

QFA Tool

Policy details ⋮

Policy: 123456

Product: Assurance Extra

Policy Fee: $1.50

↻ Reset Quote
🗑 Remove Customer 1
🗑 Remove Customer 2

Personal Details

First Name
Last Name
Age
Gender
Smoker
Occupation Class

2. Confirm your decision:

Remove Customer 2

Are you sure you want to remove Customer 2?

Cancel   Remove

3. A message will confirm successful removal:

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QFA Tool

✓ Successfully removed Customer 2.