

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
- Submit a QFA
- View Dashboard

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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

+ New QFA

All Quotes

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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: 499385
Product: Assurance Extra
Policy Fee: \$3.00

Philomena Dell

Personal Details

First Name
Last Name
Age
Date of Birth

Philomena
Dell
31
18/02/1995

Gender
Smoker
Occupation Class

Female
No
5

Coverage Details

Please ensure that the below information is correct.

Life Cover

In Force

Current Sum Insured*

Premium

\$450,000.00

\$7.28

Original sum insured: \$500,000.00

Original premium: \$7.91

Premium Review Period

Indexation

Smoker?

1 Year(s)

Yes

No

Occupation Class

Lifetime Reward

5

15%

☐ GIO

☐ Underwriting Terms (Show)

Remove Cover

Total Premium

\$14.23 per fortnight

[View breakdown & Payment Frequency](#)

Save Progress

Submit

Return to Dashboard

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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:

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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

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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View Dashboard

- › Multiple quotes will be visible prior to submission.
- › Once submitted only Submitted or Completed statuses will display.
- › Additional quotes cannot be generated if a policy alteration is in progress.

Tip: You can start submission process from dashboard view.

All Quotes

[+ New QFA](#)


Date Created ▾ ↕	Policy Number	Advisor Code	Premium ↕	Comment	Status ↕	Submitted Date ▾ ↕	Download
4 September 2026	133172.6	DZNCVR	\$80.16	qfa1	Submit		
4 September 2026	133172.7	DZNCVR	\$79.86	qfa2	Submit		

All Quotes

[+ New QFA](#)


Quote for Alteration in progress:

A new Quote for Alteration can't be created while another is in progress. Please finish the current one before starting a new quote. Downloading the quote is also unavailable at this time.



Date Created ▾ ↕	Policy Number	Advisor Code	Premium ↕	Comment	Status ↕	Submitted Date ▾ ↕	Download
4 September 2026	133172.6	DZNCVR	\$80.16	qfa1	Submitted	4 September 2026	

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Submit a QFA

- › Select quote for alteration approved by customer.
- › Confirm all policy alteration details are correct.
- › Complete the Adviser declaration to enable the Send button.

Confirm quote alteration submission

Before submitting this quote for alteration, please confirm that you have reviewed all details. If you need to make further edits, click "Cancel" and update the quote.

☐ I confirm that I have consent from the policy owner(s) listed below to proceed with this alteration. I can provide evidence of this if required.

James Purple
Sam Bloggs
Tuna Spicy
Joe Bloggs
Orange Cake

[Cancel](#)
[Send](#)

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Next Steps

- › Our team will receive and action the request.
- › The dashboard status will update to Completed when finalised.
- › The customer and adviser will be sent a copy of the policy alteration letter and endorsement schedule.