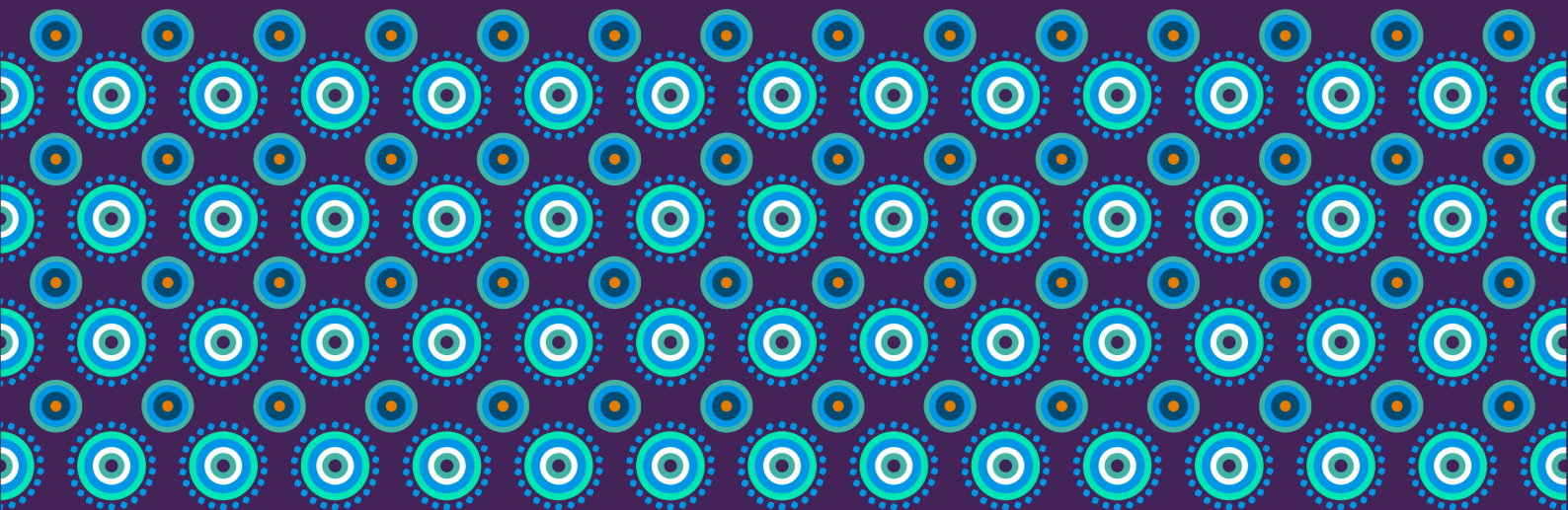


HOW TO "Upsell" on the broker portal

SMART. SIMPLE. SAFE.



Log in to the advisor portal on www.advisor.simply.co.za/login

For a completed sale, select Upsell from the Actions dropdown list

Steph Test Steph Test - 0828141872	Family Cover	Completed	STETES210422DRF	Actions ^
Terry Lynn Stier Terry Lynn Stier - 0828504568	Family Cover	Quote in progress	-	Compliance docs
Universal Call Center Niko Patrikios - 0828504567	Group Cover	Quote in progress	-	Policy document
Weinprop Residential Niko Patrikios - 0828504567	Group Cover	Quote in progress	-	Self service
				Upsell

Verify and update the personal details, if there are any changes. **Do not update the age**; this will happen automatically.

Personal details

Please verify your personal details before we update your policy. These details are important as they will affect the changes to your benefits.

Gender of person covered

☐ Male

☒ Female

Is the person covered a smoker?

☐ Yes

☒ No

Education level of person covered

☐ No Matric

☒ Matric

☐ 3yr Diploma

☐ Undergrad

☐ 4yr Degree

Monthly income of person covered (before tax)

15000

Marital status

☐ Married

☒ Not Married

Age of person covered

35

☐ I hereby declare that the information provided in this form is correct and up to date.

Save Cancel

The current benefits and cover on the policy will be auto-selected on the benefit sliders. You can update the new cover based on the requirements of your client. This includes adding/removing benefits, or increasing/decreasing existing benefit amounts.

The screenshot displays a policy configuration interface with the following sections:

- Life:** A slider showing the current cover at R0 and the new cover at R400,000. The range is from R50,000 to R2,000,000. The description states: "Pays out if the insured person dies - to support the insured person's family."
- Disability:** A slider showing the current cover at R0 and the new cover at R800,000. The range is from R200,000 to R2,000,000. The description states: "Pays out if the insured person becomes physically impaired - to support them and their family."
- Family Funeral:** A slider showing the current cover at R0 and the new cover at R40,000. The range is from R15,000 to R50,000. The description states: "Pays out in 24 hrs if the insured person, their spouse or one of their children dies - to pay for funeral expenses."
- Options:**
 - ☐ **Add extended family funeral**
Add your / your spouse's extended family members to your funeral cover. They must be under 75 and have a valid SA ID number. If there's a claim, we'll verify the relationships at Home Affairs.
 - ☒ **Add cashback benefit**
For R 142.00 extra pm, you will receive 50% of your total premium back every 5 years. So, in the first 5 years you'll pay an extra R 8,520.00 and get R 16,923.34 back. The 5 year periods begin from when you add this benefit, not from the initial policy inception.
- Cost Summary:**
 - Total Monthly Cost: R 0.00
 - New Total Monthly Cost: R 462.00 (circled in red)
- Navigation:** "Reset" button, "Next" button, and a link "or go back".

The new total monthly cost will show at the bottom of the page which can be shared with your client.



You can add or remove immediate or extended family members as well as increase or reduce their existing cover.

The Cashback benefits can also be added/removed from the policy.

All done! Please review your policy changes.

Policy Details

Your policy number is **STETES210422DRF**

Your monthly premium is **R 462.00** and your policy includes the following benefits:

Life	R 400,000.00
Disability	R 800,000.00
Family Funeral	R 40,000.00

Cash Back Benefit

The Cash Back benefit is optional and requires the payment of an additional premium. If this option is selected when the policy first incepts, you will receive a cash payback after every 5th policy anniversary equal to 50% of the total premiums you have paid in the 5 years before that anniversary.

The date of payment of the benefit will change if you have missed a premium. If premiums have been missed, you will have to pay at least 5 years' worth of premiums (60 premiums) before you can claim the benefit.

If you add this benefit after the initial policy is created, the cash payment will be made every 5 years from when the benefit was added, not from the original start date of the policy. You will also need to have paid 60 premiums since the change was made.

If your policy lapses or is cancelled, or a claim is made on the policy, then no Cash Back benefit will be paid. The benefit only refunds 50% of premiums paid in the period since the last benefit was paid, not 50% of all premiums paid since the policy started. For example, on your 5th policy anniversary, you will receive 50% of premiums paid from years 1-5, on your 10th anniversary, you will receive 50% of premiums paid from years 6-10, etc.

You may choose to cancel this option at any time and keep the insurance cover, but you will lose the right to claim any Cash Back benefit. The Cash Back benefit is 'attached' to the individual covers within the Family Combo package. This means that you can cancel one type of cover on your policy, e.g. funeral cover, and lose the Cash Back benefit on that portion of your policy **ONLY**. You will keep the benefit on your remaining cover, e.g. life and disability. In the same way, if you submit a claim under one portion of your policy, e.g. disability, you will lose the right to claim the Cash Back benefit for that portion **ONLY**; you will still be able to claim Cash Back under the remaining portions of cover, e.g. life or funeral.

An SMS will be sent to you to confirm that you are aware of (and agree to) the changes being made to your policy. Please enter it below before attempting to save your changes.

Send Confirmation Pin

Save policy changes

or go back



Click "send confirmation pin" to send an OTP to your client

You have requested changes to the benefits on your Simply policy STETES210422DRF. By providing the OTP below, you agree to your revised premium of R 462.00pm, acknowledge Simply's full T&Cs (<https://www.preprod.simply.co.za/terms-conditions>)

OTP: 730484

The confirmation pin will be sent to your client

All done! Please review your policy changes.

Policy Details

Your policy number is **STETES210422DRF**

Your monthly premium is **R 462.00** and your policy includes the following benefits:

Life	R 400,000.00
Disability	R 800,000.00
Family Funeral	R 40,000.00

Cash Back Benefit

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An SMS will be sent to you to confirm that you are aware of (and agree to) the changes being made to your policy. Please enter it below before attempting to save your changes.

730484

Resend

Save policy changes

Enter OTP or PIN and click on 'save policy changes' in order complete the Upsell and make the amendment to the policy

Policy changes submitted

Thank-you for completing your policy changes, they will be applied to your contract along with the new pricing.

Close window and return to broker portal



Thank you!

Contact your broker consultant if you have any queries or need assistance.



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