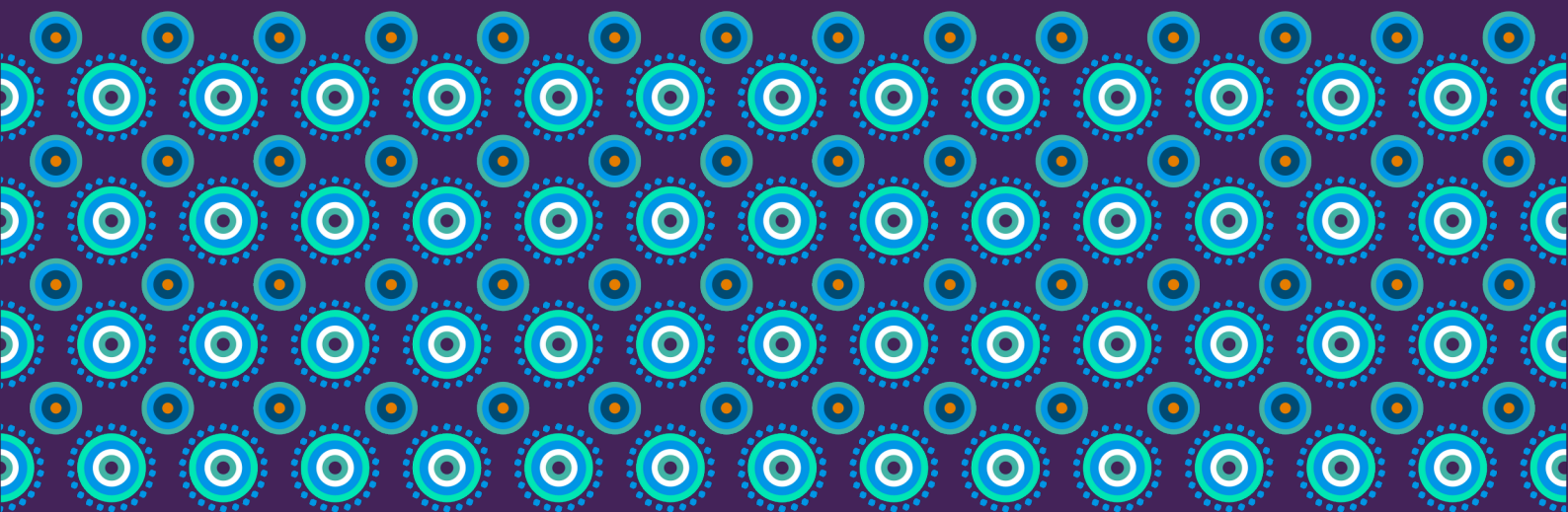


How to:

# View your clients' policies on the Broker Portal

SMART. SIMPLE. SAFE.



Log in at [www.advisor.simply.co.za](http://www.advisor.simply.co.za)

Click on "policy document" to view all policy details

**5 Completed sales**

Name	Type	Contact	Policy number	Completion date
Sarah Smith				
Debicheck status: Other (2022-09-30 at 16:30) Failure reason: CDV Failure	Family Cover	0828141872	SARSMI220930PSA	Fri 30 Sep 2022

All required compliance documents uploaded ✓

[Policy document](#)[Self service](#)[Resubmit mandate](#)

Click on "edit policy" to show the below screen.

[Edit Policy](#)[Print](#)

**SIMPLY FAMILY COVER  
STANDARD**

Welcome to SIMPLY, Sarah  
Your policy has been tailored to your unique needs, and promises you and your loved ones financial support when it's needed most.  
Please read this Policy Schedule carefully.  
Your Policy Number: SARSMI220930PSA

**POLICY DETAILS**

POLICY NUMBER: SARSMI220930PSA  
ISSUED: 01/10/2022  
LAST UPDATED: 30/09/2022  
POLICYHOLDER: Sarah Smith  
IDENTITY NUMBER: 8708130086085

**BROKER DETAILS**

COMPANY: Simply Financial Services  
NAME: Stephanie Wulf  
EMAIL ADDRESS: steph@simply.co.za  
MOBILE NUMBER: 0828141872

You can add, edit or delete beneficiaries here

**Beneficiaries (who we should pay if there is a claim)**  
• You can nominate multiple beneficiaries for Life cover

Beneficiary	Life	Single Life Funeral	
Jane Smith 1985-08-20	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Delete</a>

[+ Add another](#)

**Consent**

Would you like to be contacted for special offers?

☐ Opt In  
☒ Opt Out

[View policy document](#)

Click on "self service" to view the screen below. You will see different options along the top bar of the page. E.g policy summary, payment details etc

Contract	Policy Summary	Payment Details	Benefits	Debit Orders	Salary Deductions	Changes	Tickets
ACTIVE (NOT YET ON COVER)		Refresh Notes					
DebiCheck status:	Other (CDV Failure on 2022-09-30)						
Transaction number:	SARSMI220930PSA						
Cover start date:	2022-10-01						
Collection date(s):	Show						
Cashback:	✓ Premium: 214.00						
Premium:	R 637						
Owner:	Sarah Smith (Id number: 8708130086085) 0828141872						
Insured:	Sarah Smith (Id number: 8708130086085) 0828141872						
Broker:	Simply Financial Services Stephanie Wulf steph@simply.co.za 0828141872						
Collection:	We cannot load the status of the collection right now.						
Debit day override:	No override is in place. See collection dates for more information.						
Admin follow up:							

View the policy summary on the second tab

Contract	Policy Summary	Payment Details	Benefits	Debit Orders	Salary Deductions	Changes	Tickets
Policy SARSMI220930PSA							
Purchased on 30 September 2022							
Purchased via Online							

View payment details here

Contract	Policy Summary	Payment Details	Benefits	Debit Orders	Salary Deductions	Changes	Tickets
Type Debit order							
Account number 1234567890							
Branch code 470010							
Bank CAPITEC BANK LIMITED							
Savings							
Preferred debit day 1							

View policy benefits here

Contract	Policy Summary	Payment Details	Benefits	Debit Orders	Salary Deductions	Changes
Tickets						
<b>Benefits</b>						
			Cover	Premium	Status	
Life (sim-life-slf)			R1,000,000	R267.00	Active	
Disability (sim-disability-slf)			R1,050,000	R49.00	Active	
Single Life Funeral (sim-single-funeral)			R60,000	R107.00	Active	
Life Cashback (sim-life-slf-return-on-premium)			R1,000,000	R134.00	Active	
Disability Cashback (sim-disability-slf-return-on-premium)			R1,050,000	R29.00	Active	
Single Life Funeral Cashback (sim-single-funeral-return-on-premium)			R60,000	R51.00	Active	
<b>Beneficiaries (who we should pay if there is a claim)</b>						
• You can nominate multiple beneficiaries for Life cover						
Beneficiary	Life	Single Life Funeral				
Jane Smith 1985-08-20	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">+ Add another</a>						

Selected debit order details will be shown here

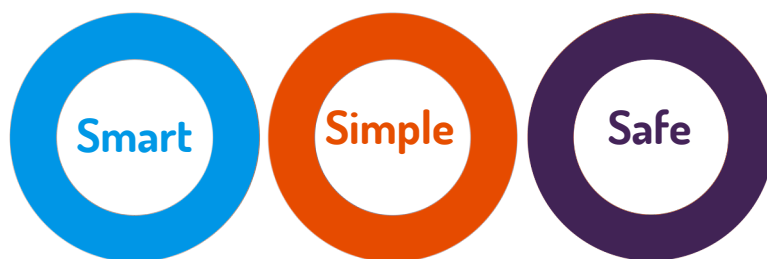
Contract	Policy Summary	Payment Details	Benefits	Debit Orders	Salary Deductions	Changes	Tickets
No collections have been processed for this contract							

Salary deduction details will be shown here if applicable

Contract	Policy Summary	Payment Details	Benefits	Debit Orders	Salary Deductions	Changes	Tickets
Transaction Type	Month Due	Member Number	Status	Premium	Amount Paid	Status Datetime	

Any changes that have been made to the policy will be shown here

Contract	Policy Summary	Payment Details	Benefits	Debit Orders	Salary Deductions	Changes	Tickets
Date	Author	Updated					
30-09-2022 16:30	Sale	Original contract				<a href="#">Policy Document</a>	



# Thank you!

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



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