

My Resolution Life

Continuation Option from
Corporate/Group to Elevate

How to Guide

Resolution Life

Continuation Option from Group to Elevate

- If your client is leaving an RLA group plan such as their employer's group insurance plan, (Summit/Generations or IAccess) group insurance, they may be eligible to continue their cover as an individual through an Elevate plan.
- Provided a continuation option is available from their employer's group insurance plan and the application requirements are met, a continuation of like for like individual cover will be available for them with Elevate, without the need for additional medical evidence.
- In the first instance, you will need to contact Group Insurance Administration at giadmin@resolutionlife.com.au to obtain a Continuation Option Application Form and also to confirm your client is eligible. The form is to be signed by the client and then returned with Elevate application forms and quote.

Continuation Option from Group to Elevate

You will need to submit the following:

1. The Continuation Option form, provided by Group.
2. An Elevate new business quote, for like for like cover.
3. [Elevate insurance application form](#)
4. [Elevate insurance personal statement application form](#)

The application to apply may be submitted via a paper form or Elevate online application via My Resolution Life portal.

The forms must be completed and submitted to Resolution Life Elevate **within 60 days** of the client ceasing work with the employer.

Note: No extensions to the 60 days is available and if the employer plan is closed, the continuation option will **not** be available.

Helpful tips

- The amount of insurance benefit available under the new individual Elevate plan must be the same or lower than the insurance benefit for which the client is covered under their employer's plan.
- If your client currently has an existing Elevate policy with Resolution Life in force, remember to add the existing sums insured under the current Elevate plan to the quote. This can be found under the discounts and reductions tab in the Elevate online tool, where you can also waive the policy fee on your client's new business quote.
- The Elevate Application form must be fully completed.
- In addition to the above, complete the following questions from the Elevate Personal Statement Application form that can be found in the Elevate online quote tool.

Resolution Life

Quote Reference Documents Reports

- Enduring Rollover Authority
- Product Disclosure Statement
- Trauma reinstatement and or life buy-back option
- Application Form
- Personal Statement**
- Declaration and consent

First name *

First name

Helpful tips

- On the [Elevate insurance personal statement application form](#), please complete the following sections:

For Life Cover:

- Residence and travel details - question 1, page 5
- Insurance details - question 4, page 6.
- Personal habits (Smoking question) - question 8, page 7
- Sports and pastimes - question 26 & 27, page 12,13 and 14

For TPD and/or Income Protection cover:

- In addition to the above, complete the occupation and income sections of the Personal Statement - page 28 and 29.

ie. It is basically all the relevant sections of the application form and personal statement that would apply for that cover except for the medical questions.

- Return all forms and the quote back to insurance@resolutionlife.com.au

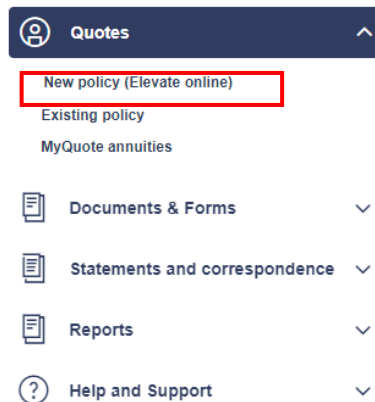
Generating a quote

Step 1

- [Log in](#) to My Resolution Life

Step 2

- Select **Quotes** in the left-hand menu
- Select **New policy Elevate online** in the drop-down menu



Generating a quote

Step 3

- The application type to be selected is **New plan**

Elevate Insurance

Adviser Name
Fihbaogvbi Avxi (mhroh@fihbaogvbiavxi.zbs.mo) - 283443

I would like to... *

Transfer

New plan

Continuation

The person insured or the policy owner is an existing customer of Resolution Life? *

Yes No

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Step 4

- When selecting occupation, please use the specific occupation category and not a generic occupation category e.g. light manual, white collar worker.

Customer occupation *

light

Retired	Life	Trauma	TPD Any	TPD Own	TPD ADL	IP
Agent - Real estate (Light manual work)	A	A	B	N/A	A	B
Electrician - Domestic or light commercial (with trade qualification)	A	A	C	N/A	A	C
Exporter / importer - Some light manual work	A	A	B	N/A	A	B
Importer / exporter - Some light manual work	A	A	B	N/A	A	B
Repairer / service technician - Light manual (eg office machines)	A	A	B	N/A	A	B
Shop proprietor / assistant - Hardware (light fitting)	A	A	C	N/A	A	C
Shop proprietor / assistant - Not otherwise rated (Light goods only (eg clothes))	A	A	B	N/A	A	B
Storeperson (light manual)	A	A	C	N/A	A	C

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- Follow the prompts to complete your quotation request

What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is part of the Resolution Life Group and can be contacted via the Contact us page.

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