

# **My Resolution Life**

## **How to Guide**

# **Digital direct debit form**

**Bank, credit/debit accounts only**

# Digital direct debit form

## Locating the form

- Access the form through [Find a form](#)

## Completing the search criteria

**Step 1** – Click on the down arrow and scroll to **Change my payment details**

**Step 2** – You can either type in your client's product name or scroll to their product name


## Which form is the right one?

When the Search Results are displayed, you will select the **Digital** form option to complete the form online.

**Step 1.** Select what you would like to do:

Select options



**Step 2.** Select your product: \* 

Select options



# Digital direct debit form

## Step 1

- Complete all **Policy owner details** marked with an asterix
- We encourage your client to provide their email address, so we can email them their request confirmation.\*
- Your client will need to provide either a mobile number or home number.\*

If your client does not provide a mobile or home number, then a paper form will need to be completed.

## Step 2


- Your client will need to tick the **reCAPTCHA** box (digital confirmation they're human)
- Select **Next** to continue

\*If your client does not supply an email address or mobile number, then confirmation will not be sent to your client, but the request will be recorded against their policy with us.

### Direct debit request

Use this form to set up or update an existing direct debit payment from your bank account or credit/debit card

**1** Policy owner details

Policy/Plan number \* 


First name \*

Last name \*


Date of birth \*

Email address \*  I don't have an email address

Mobile Number


 (+61)

Home Number

 (+61)

**2**

This reCAPTCHA is for testing purposes only. Please report to the site admin if you are seeing this.

I'm not a robot  reCAPTCHA  
Privacy - Terms

**What you need to know**

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is the issuer of this form. The information contained in this form is factual information only and it does not contain any financial product advice or make any recommendations about a financial product or service being right for you.

Resolution Life is part of the Resolution Life Group and can be contacted via [resolutionlife.com.au/contact-us](http://resolutionlife.com.au/contact-us) or by calling 133 731.

**Next**

# Digital direct debit form

## Step 3

- A pop up will appear, providing your client with the direct debit service agreement which is relevant to their product
- Your client will be able to click on the link for more information
- To continue, your client will click **OK**

**Direct debit request**

Use this form to set up or update an existing direct debit payment from your bank account or credit/debit card

**Policy owner details**

Policy/Plan number \*

First name \*

Last name \*

Date of birth

Email address

Mobile Number


Home Number

**3 Before you begin**

Please read the direct debit information sheet for more information about this direct debit request.

Ok

This reCAPTCHA is for testing purposes only. Please report to the site admin if you are having this.

I'm not a robot 

**What you need to know**

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Next

# Setting up a new direct debit

## Step 4

- Your client can choose from 3 options to proceed

### Note

- Update card expiry date will only appear if the policy is set up with an existing credit/debit card.

## Option 1: Set up a new direct debit – Payment method

- Your client will select their payment method
- The payment frequency displayed will be based on your client's policy

### Notes

- For superannuation or investment policies please provide **Start date** and **Payment amount**.
- Depending on your clients account with us, additional pop-ups may appear with additional information such as contribution fee or frequency loading information.
- Credit/Debit card availability depends on the entered policy

4 **Direct debit setup**

What do you want to do?

Set up a new direct debit  Update an existing direct debit  Update card expiry date

**Direct debit setup**

What do you want to do?

Set up a new direct debit  Update an existing direct debit  Update card expiry date

Payment method \*

Bank account  Credit/Debit card

Payment frequency

- select -

# Setting up a new direct debit

## Option 1: Set up a new direct debit – Bank account details

- All fields marked with an asterix must be completed
- Your clients BSB number is digitally validated when entered, updating the **Name of institution** and **Branch location** fields.

### Please enter your bank details

---

**Account name \***

**BSB number \*** **Account number \***

**Name of institution**

**Branch location**

# Setting up a new direct debit

## Option 1: Set up a new direct debit – Credit/debit card details

- All fields marked with an asterix must be completed

Note:

- CVN can also be known as CSC/CVC/CVV

### Please enter your card details

Cardholder name \* Test environment

Card number \* VISA

Card expiry date \*

Month  / Year

CVN \* ?

# Update an existing direct debit

## Option 2: Update an existing direct debit

- All fields marked with an asterisk need to be completed
- **Payment frequency:**
- If your clients selects **Yes**, the payment frequency displayed will be based on your client's policy
- If your client selects **No**, no payment frequency option will be displayed.

### Note:

- For superannuation or investment policies your client must provide **Payment amount**.
- Depending on your clients account with us, additional pop-ups may appear with additional information such as contribution fee or frequency loading information.
- Credit/Debit card availability depends on the entered policy.

**Direct debit setup**

What do you want to do?

Set up a new direct debit  Update an existing direct debit  Update card expiry date

Payment method \*

Bank account  Credit/Debit card

Update your existing payment frequency? \*

Yes  No



# Update an existing direct debit

## Option 2: Update an existing direct debit– Bank account details

- All fields marked with an asterisk must be completed
- Your clients BSB number is digitally validated when entered, updating the **Name of institution** and **Branch location** fields.

**Please enter your bank details**

---

**Account name \***

**BSB number \*** **Account number \***

**Name of institution**

**Branch location**

# Update an existing direct debit

## Option 2: Update an existing direct debit– Credit/debit card details

- All fields marked with an asterix must be completed

### Note:

- CVN can also be known as CSC/CVC/CVV

### Please enter your card details

---

Cardholder name \* Test environment

Card number \* VISA

Card expiry date \*

Month  / Year

CVN \* ?

# Update card expiry date

## Option 3: Update card expiry date

- All fields marked with an asterix must be completed
- The payment frequency displayed will be based on your client's policy

### Direct debit setup

What do you want to do?

Set up a new direct debit    Update an existing direct debit    Update card expiry date

Payment frequency \*

Fortnightly

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# Update card expiry date

## Option 3: Update card expiry date – Credit/debit card details

- All fields marked with an asterisk must be completed

### Note:

- CVN can also be known as CSC/CVC/CVV

### Please enter your card details

Test environment

Cardholder name \*  
Name

Card number \*  
Number

Card expiry date \*  
Month / Year

CVN \* ?  
xxx

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# Review your direct debit request

## Step 5

- Ensure that your client has checked the **Review your direct debit** page to ensure that their details are correct.
- It is important that your client has read the declaration and ticked the acknowledgment box.
- If there are multiple account holders, select **Add another signature**.
- Once all the details are confirmed, please **Submit**.

### Review your direct debit

**Policy number**  
**Payment method**  
**Cardholder name**  
**Card number**  
**Card expiry date**

#### Declaration and authorisation

By completing this direct debit request form, I/We acknowledge and agree with the following statements:

- I/We request Resolution Life Australasia Limited (Resolution Life) to debit the bank or credit card account nominated above with any amounts which they may debit or charge to me/us through the direct debit system.
- I/We understand that Resolution Life or I/We may terminate this request at any time.
- I/We have read and understood the information provided on the direct debit request information sheet.
- I/We have read and agree to the terms of the direct debit service agreement.
- I/We have read Resolution Life's privacy policy, which is available at [resolutionlife.com.au/privacy](http://resolutionlife.com.au/privacy), and I/We acknowledge how Resolution Life handles, stores, collects, uses and discloses my personal and sensitive information.

I/We acknowledge and agree with the above statements

**First Name \***  **Last Name \***

**Signature**

If there are multiple policy owners, please add all policy owner signatures

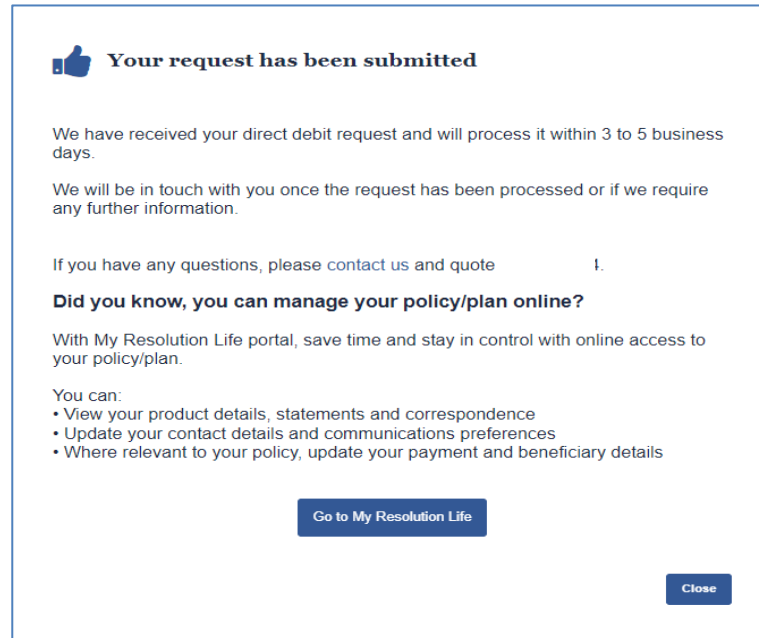
# Confirmation

## Step 6

- In Step 1, your client would have added either their email address or mobile number.
- If an email address was supplied, then an email confirmation will be sent to them.

- If a mobile number was supplied, then a text message will be sent to them from **ResLife**.
- If no email address or mobile number is provided, then confirmation will not be sent to your client, but the request will be recorded against their policy with us.

If you have any questions or need further clarification, start an online chat with via the Resolution Life [website](#).



**👍 Your request has been submitted**

We have received your direct debit request and will process it within 3 to 5 business days.

We will be in touch with you once the request has been processed or if we require any further information.

If you have any questions, please contact us and quote 1.

**Did you know, you can manage your policy/plan online?**

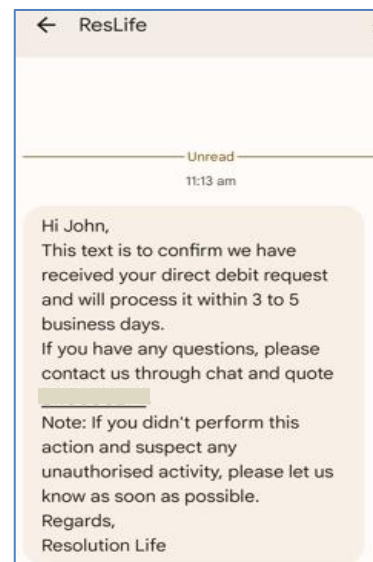
With My Resolution Life portal, save time and stay in control with online access to your policy/plan.

You can:

- View your product details, statements and correspondence
- Update your contact details and communications preferences
- Where relevant to your policy, update your payment and beneficiary details

[Go to My Resolution Life](#)

[Close](#)



← ResLife

Unread  
11:13 am

Hi John,  
This text is to confirm we have received your direct debit request and will process it within 3 to 5 business days.  
If you have any questions, please contact us through chat and quote 1.

Note: If you didn't perform this action and suspect any unauthorised activity, please let us know as soon as possible.

Regards,  
Resolution Life

# Thank you

## What you need to know

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**Resolution Life**