

## **Frequently Asked Questions for the Introduction of Online Unit-Linked Statements for International Advisers**

### **How can I access customers' yearly policy statements for unit-linked life products and conventional mortgage endowment products?**

There is a new tab called 'Statements' in the secure policy servicing area of our website – you will be able to access your customers' statements here.

### **Do I need to be registered to use your secure online services to access online statements?**

Yes you do.

All of your customers' statements will be held in the secure policy servicing area of our website. Once registered, you can log in to use our secure online services and manage your business online.

### **How can I register?**

Simply complete our [registration form](#) and we will be in touch to let you know when you can start using our secure online services.

### **I have customers that want to opt out of paper statements, what do they need to do?**

Customers will continue to receive paper statements until later in 2010 when they will be offered the choice online.

### **How long will the statements be available online for?**

For statements issued from December 2009 onwards, you will be able to retrieve them online for up to five years. If you are likely to need them beyond this, you can always save or print a copy because they are in PDF format.

### **I still need paper statements what shall I do?**

You have two options:

1. Do nothing and continue to receive paper copies from us
2. Cancel your paper copies and print the ones you need from our website

### **I no longer want to be sent paper customer copy statements. What do I need to do?**

Please [email our agencies team](#), who will arrange for your copy paper statements to be switched off.

### **Why should I switch off paper statements?**

There are a number of reasons why you should become paper free:

- You will have access to your customers' statements online 7 days a week
- You can access statements from anywhere you can get internet access
- Statements are safely located on our secure extranet

- Online archive for statements issued from mid December 2009 onwards – retrieve them for up to five years
- Reduces paperwork
- You are still able print statements if required
- Save paper and help the environment
- Available straight away – no delays waiting for the post

### **Which products/policies will benefit from online statements?**

At this stage, online statements will be available for unit-linked life products and conventional mortgage statements only.

### **Do my customers still receive paper policy statements?**

Yes, they will continue to receive paper statements by post. Your customers will be able to opt out of paper statements in 2010.

### **Will the online statement be different to my paper copy version?**

There may be some differences as you are now seeing exactly the same version of the statement that the customer receives.

### **What if I change my mind?**

If you cancel your paper copies but change your mind, just [email our agencies team](#) and we will start sending you paper copies again.