



Online Servicing Guide

Do you want updates on your clients existing applications or policies, without the need to call Customer Services?

When opening a client's policy, the AIG system will intuitively direct you to either the quote and apply screens or our Online Servicing screens based on the status of the policy.

There are four different parts of the policy that you can view on our Online Servicing pages:

1

Plan Summary

The plan summary screen is an overview of the policy.

2

Customer Summary

Each life assured, cover owner and/or business owner will have their own summary page.

3

Payment Summary

There is a single payment summary screen for the whole policy, allowing you to change a bank account or restart a direct debit.

4

Cover Summary

Each cover under the policy will have its own cover summary page.

You can view:

- Current status of applications
- Payment history for premiums paid on entire policy
- Commission details including statement date, commission amount, current claw-back, renewal commission date
- Bank account information, including current status of direct debit
- Active and terminated covers

Allowing you to:

- Change your client's name, address, email and telephone number
- Resend policy documents to your client via email
- Terminate existing covers
- Restart terminated covers
- Send blank trust forms to your client
- Amend correspondence and marketing preference

If you have any questions or need any guidance please contact your field or office based account manager, or call our Sales Team on **0345 600 6829**, visit www.aiglife.co.uk, follow us on



@AIGLifeUK and connect with us on



AIG Life Ltd.