For financial adviser use only. Not approved for use with customers.

Aviva Life Protection Solutions (ALPS)

Online protection in focus

Smart, simple and convenient

Our ALPS digital platform allows you to quote, apply, track and manage protection cover for your clients quickly and simply. And if you use a portal we transfer the data directly through to ALPS.

Quote, apply, edit

With ALPS you can:

- Generate and compare quotes for multiple covers in a simple, easy to edit journey.
- Edit or make changes to an application even after an underwriting decision: increase sum assured or policy term or add cover options if your client's circumstances have changed.

- Edit client details throughout the application process
- Correct mistakes without starting from scratch
- Edit, compare and remove products as needed

Medical info & interactive underwriting

We'll ask for consent to access your client's medical records and capture their GP details as part of the ALPS journey. This means if we need a GP Report we can request it straight away, where possible using the i-GPR software to allow GPs to send reports to us digitally.

Combining intelligent underwriting systems with our underwriting experience & expertise means we ask for only the information we need to make an instant decision.

- **Around 8 in 10 customers receive an immediate decision** - based on acceptance at ordinary rates with no exclusions
- **Around 9 in 10 customers receive a decision within 48 hours** - ALPS Business Tracking is the easy way for you to access your client's protection policy online, providing you with information on new and existing business.

Based on Aviva underwriting data for 2021.

It’s quick and easy to register for tracking and make the most of its features

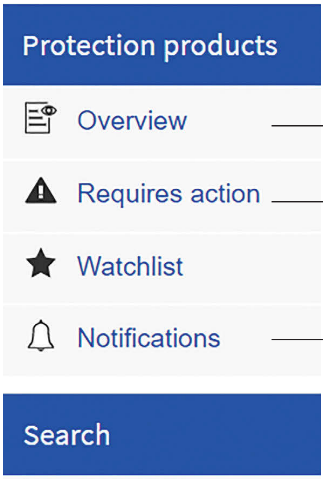
Register for tracking in 3 simple steps

1. Log in to your ALPS account
2. Select ‘Tracking’
3. Click on the ‘Register/manage alert updates’ button at the top right of the page

- With real time 24/7 alert service you choose how and when you get updates on your applications and existing policies to manage your pipeline.
- Keep track of your new business cases. Check on evidence required, bank details needed, terms offered and action needed to get your policies live.
- View GP details, start a reissued policy and view underwriting evidence notifications.
- Sign up to Existing business alerts to see when clients miss payments and policies due to lapse.

How can Tracking help you?

Tracking lets you follow the progress of your new business applications through the quote, apply and purchase journey. It’s also the go to place for existing business policy information.



Access the overview screen for a ‘one-stop’ view.

- Access policy documents
- View our latest policy decisions
- Retrieve a previously deferred application and submit this with the updated information
- Use a wide range of filters to search for individual or groups of clients
- View a summary of your current applications and real-time status updates
- See all notifications and changes on any new business cases including;
  - Evidence that’s been requested
  - Terms offered
  - Start date and bank details needed

Your ready made ‘to-do’ list

- Use the ‘Requires action’ screen to stay up to date with any actions you need to take to progress your cases
- Sign-up to our e-mail alert service and we’ll let you know when you have new actions to take

Look at your notifications

- Over 150 different alerts across new and existing business keep you up to date with your client portfolio to help you manage pipeline and retention.
- Key notifications include:
  - When further supporting evidence is required for your application, for example: personal health questionnaire, financial accounts or financial supporting evidence
  - When further medical evidence is required
  - When a policy has been issued, closed or referred to underwriting
  - Missed payments, policy due to lapse and cancelled policies.

Retrieving deferred applications

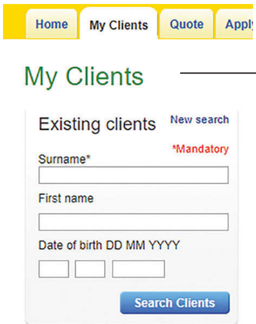
Sometimes we can't offer cover at the time of application. Where the risk is too high but may improve in the near future, we will provide a deferred decision. The customer could be deferred for a specific period of time or until they can meet certain criteria e.g. if waiting for investigations.

For deferred decisions, the application will remain on tracking for 90 days. You will be able to retrieve the application, edit the Health and Lifestyle questions and submit the application for underwriting when the customer meets the criteria outlined in our original decision.

In cases where the customer has not met the required criteria within 90 days, a new application will be required at the time the customer is in a position to be reconsidered.

My Clients

My Clients allows you to service your existing clients effectively, without missing any key updates.



View existing client details

- Here you can access existing policy information, including:
  - An overview of your client's product type, policy status, start date, policy term, current sum assured, lives assured and policy features/benefits
  - Financial information such as premium amount, collection day, premium frequency, direct debit status and premium type
  - View your client's policy documents
  - Download a report with the latest personal and policy information to send to, or discuss with, your client.

For more information please speak to your usual Aviva contact or visit our Adviser site.

MyAviva

We make it easy for your clients to access their policy information online. They can 'register' for MyAviva at **aviva.co.uk/myaviva** - we only need a few details to set up their account.