

Adviser Group Quote Request Form



General Details

Policy Owner	<input style="width: 95%;" type="text"/>	
Industry/business activity	<input style="width: 95%;" type="text"/>	Employer(s) and ABN (s) <input style="width: 95%;" type="text"/>

Adviser Details (Servicing Adviser)

Adviser company name	<input style="width: 95%;" type="text"/>		
Adviser name	<input style="width: 95%;" type="text"/>	Dealer group	<input style="width: 95%;" type="text"/>
Adviser phone	<input style="width: 95%;" type="text"/>	AIA Adviser Code	<input style="width: 95%;" type="text"/>
Adviser email	<input style="width: 95%;" type="text"/>	How did you know about AGI?	<input style="width: 95%;" type="text"/>
Commission (0% - 30%)	<input style="width: 15%;" type="text"/> %	Date quote required	<input style="width: 95%;" type="text"/>

Plan Details

Category number: Partner Employee

Salary Continuance

Benefit formula or design	<input type="checkbox"/> New plan <input type="checkbox"/> Existing plan	Plan review date	<input style="width: 95%;" type="text"/>	Plan start date	<input style="width: 95%;" type="text"/>
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Please complete this section if Insured Members are employees

Components of Insurable Income Replacement ratio of Insurable Income - (Max 75%) %

Tick box if applicable Base salary Regular commission/bonus Regular overtime Car Allowance Prevailing SG Contribution

Superannuation options if Prevailing SG Contribution is not included in Insurable Income above:

Insure 100% of Prevailing SG Contribution Other fixed % of Insurable Income (up to 15%) %

Members who own directly or indirectly part of the business or practice will receive the AIA standard Partner income definition
Bonuses, overtime earnings and commissions will be calculated on the average of the last 3 years bonuses, overtime earnings and commissions received by the Insured Member from the Employer. When the **Insured Member** has been seconded overseas for reasons of employment, the **Insured Member's Income** must be advised in Australian Dollars.

Is Super capped to the SGC Threshold Yes No

Eligibility criteria
e.g. All Permanent Employees upon commencement

Category information

Waiting period 30 days 60 days 90 days

Benefit design 2 years 5 years To age 65 To age 65 + 2 year Top Up Benefit Expiry

Expiry Age 65 70

Ancillary Benefits Accommodation Family Care Home Care Nursing Care
 Overseas Assistance Specific Injury Enhanced Death Trauma

Group Life and TPD

<input type="checkbox"/> Ordinary <input type="checkbox"/> Superannuation	<input type="checkbox"/> New plan <input type="checkbox"/> Existing plan	Plan review date	<input style="width: 95%;" type="text"/>	Plan start date	<input style="width: 95%;" type="text"/>
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Please complete this section if Insured Members are employees

Components of Insurable Income (Tick box if applicable) Base salary Regular commission/bonus Regular overtime Car Allowance Prevailing SG Contribution

Members who own directly or indirectly part of the business or practice will receive the AIA standard Partner income definition
Bonuses, overtime earnings and commissions will be calculated on the average of the last 3 years bonuses, overtime earnings and commissions received by the Insured Member from the Employer. When the **Insured Member** has been seconded overseas for reasons of employment, the **Insured Member's Income** must be advised in Australian Dollars.

Eligibility criteria
e.g. All Permanent Employees upon commencement

Category information / Benefit Design
e.g. Multiple of Income or fixed Sum Insured

Accidental Top Up Death Benefit Yes No

Confirm TPD definition if it is to be included Any occupation Own occupation Life and TPD to age 65 Life and TPD to age 70

Please complete Plan Details on additional forms if more than one category is required

Information for existing law firm plans - Please provide the following: Last 3 years' sum insured history and last 3 years' claims history

EMAIL TO: sales@agigroup.com.au