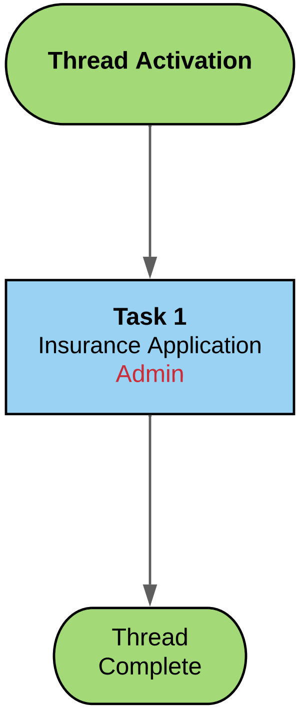

Checklist

1. Check Authority to proceed is signed
2. Complete Pre Assessment
3. Print forms for client signature
4. Follow up client to sign forms
5. Complete application online or submit forms to provder
6. Client to complete any medicals as per insurers instruction(If Required)
7. Follow up client if medicals are completed
8. Follow up provider for confirmation of receipt of application and any potential loading and exclusions
9. Sign off on loadings and exclusions (If Required)
10. Ensure signed documents are saved in Xplan
11. Email Insurance confirmation to Client once account is opened
12. Cancel/Alter Pre-existing policies once new policies are inforce ⚠
13. Update Xplan record (e.g. Review management etc.)