

Someone has asked for your help with travel insurance...

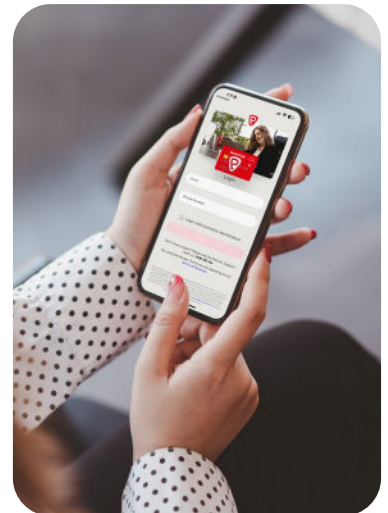
We can handle the entire process for you.

There are three simple ways to obtain a leisure travel insurance quote with PassportCard: sending your client a link, lodging a lead, or sitting with them to get a quote.

- ✓ **Unique URL** – Client quotes themselves.
- ✓ **Lodging a Lead** – Broker lodges via the Broker Portal or Broker App and we call the client.
- ✓ **Via our Broker Portal or Broker App** – Broker quotes themselves via the Broker Portal or Broker App and can apply a broker fee.

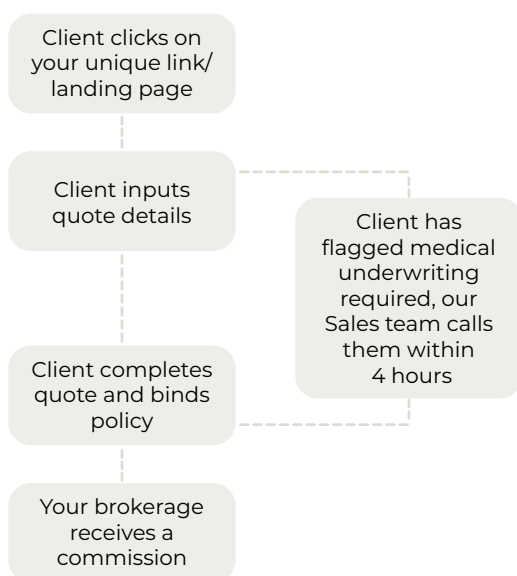
What to Know Up Front

- We collect the payment from your client upfront before binding. No credit terms or Closings.
- There is a 20% commission on each method of quoting.
- If your client needs a pre-existing medical assessment, we contact them directly.



Unique URL

Clients can quote and bind their own policies. If you've set up your digital assets, this might even happen automatically without you knowing!



How do I get my office unique URL or landing page link?

You can obtain your unique URL from our Broker App or Broker Portal. You can get the landing page link from the Broker Portal.

How can I send through Closing advice if clients are taking out policies without me knowing?

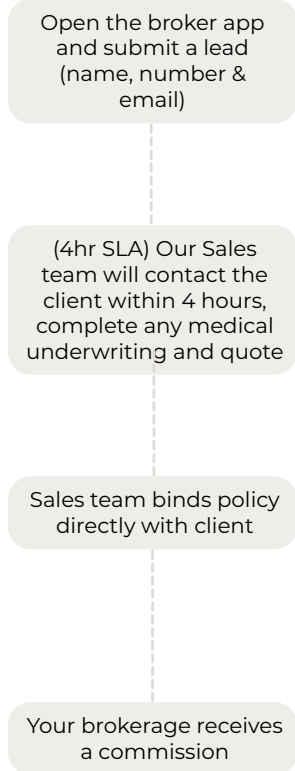
All our policies are paid upfront with the client's card details which means no additional processing on your broker platform, and no need for you to send through a Closing advice.

How will I know when a client purchases a policy?

The Policy Schedule and PDS are sent to both your client and your office upon binding, ensuring that you're kept informed.

Lodging a Lead via our Broker Portal or Broker App

You tell us your client's full name, mobile and email – we'll handle the rest of the process for you.



Will you contact the client on my behalf?

Yes, we will contact your client to guide them through the quote process and collect payment if they choose to bind. This is especially helpful for those with pre-existing medical conditions.

How can I track the progress of a Lead I submitted?

You can view the status under the Leads tab in our Broker Portal.

Once we've contacted your client and generated a quote, you'll be able to download or bind it in the 'Quotes' tab (see screenshot below).

What if my client is only available at a certain time?

No problem, simply put this in the "comments" field and our Sales team will be able to schedule accordingly (see screenshot below).

My client didn't answer their phone today, can your team try again?

Of course! We contact broker clients once a day for five consecutive days. If we are unable to speak to them or if we are unable to provide a cover, you will receive an email from our Partner Support Team.

Quotes tab

The screenshot shows the 'Quotes tab' interface. At the top right is a blue button with a plus icon and the text 'Create new'. Below this is a table with two columns: 'Status' and 'Referring Entity'. The first row of data shows 'Policy issued' under Status and 'Broker' under Referring Entity.

Status	Referring Entity
Policy issued	Broker

Comments section

The screenshot shows the 'Create a new lead' form. It has a title bar with a close button. Below the title is a subtitle: 'Enter the Customer's information, the travel date and comments if necessary'. The form contains several input fields: 'First Name', 'Last Name', 'Email', 'Telephone', and 'Travel Date'. There is also a 'Comments' text area. A red arrow points to the 'Comments' field. Below the comments field is a small text line: 'The representative will only see the comment when contacting the Customer'. Below that is a checkbox with the text: 'I confirm that the customer has given their consent to transfer their information to PassportCard for the purpose of receiving a travel insurance offer.' At the bottom are three buttons: 'CANCEL', 'SEND LEAD AND CREATE NEW', and 'SEND LEAD'.

Create a new lead

Enter the Customer's information, the travel date and comments if necessary

First Name: Last Name: Email:

Telephone: Travel Date:

Comments:

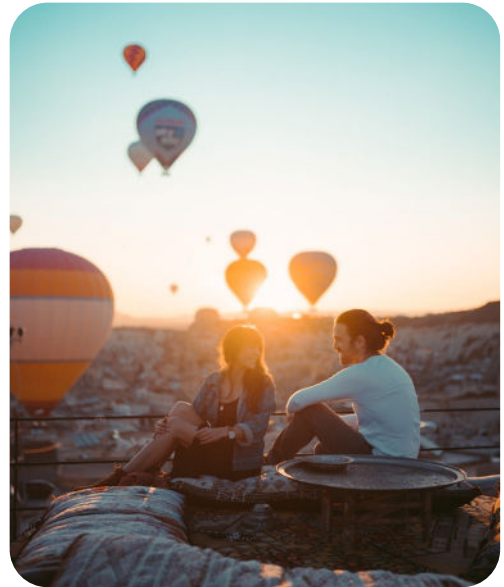
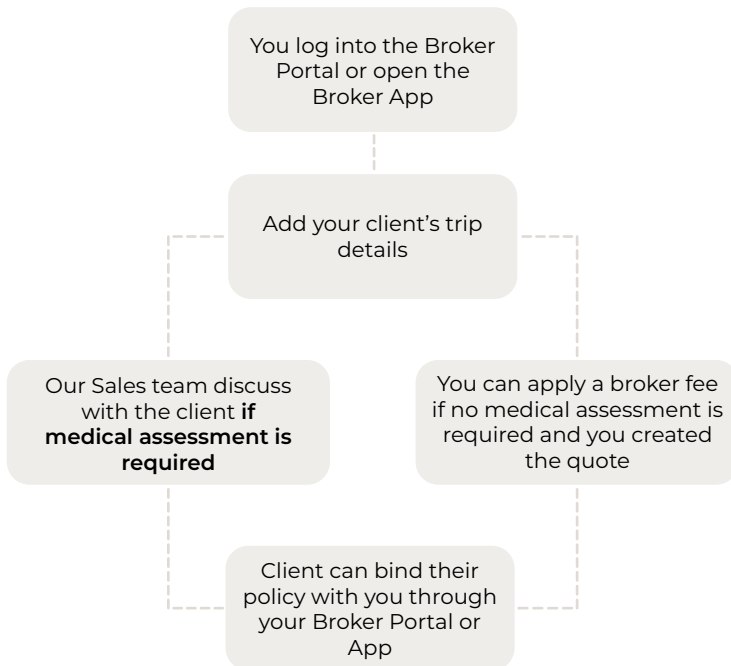
The representative will only see the comment when contacting the Customer

☐ I confirm that the customer has given their consent to transfer their information to PassportCard for the purpose of receiving a travel insurance offer.

CANCEL SEND LEAD AND CREATE NEW SEND LEAD

Quote via Broker Portal or Broker App

You can quote yourself via the Broker Portal or Broker App and apply a broker fee



For more information on your compliance requirements, please refer to the 'Broker Disclosure Requirements' document available on our Broker Portal.

If you have any questions about how to obtain a quote, please don't hesitate to contact your PassportCard representative or our Partner Support Team at 1300 123 414.



PassportCard Australia Pty Ltd (PassportCard) ABN 76 621 476 220 (AFSL 551 057) is an underwriting agency acting under binder from the Insurer, Guild Insurance Limited ABN 55 004 538 863 (AFSL 233 791).