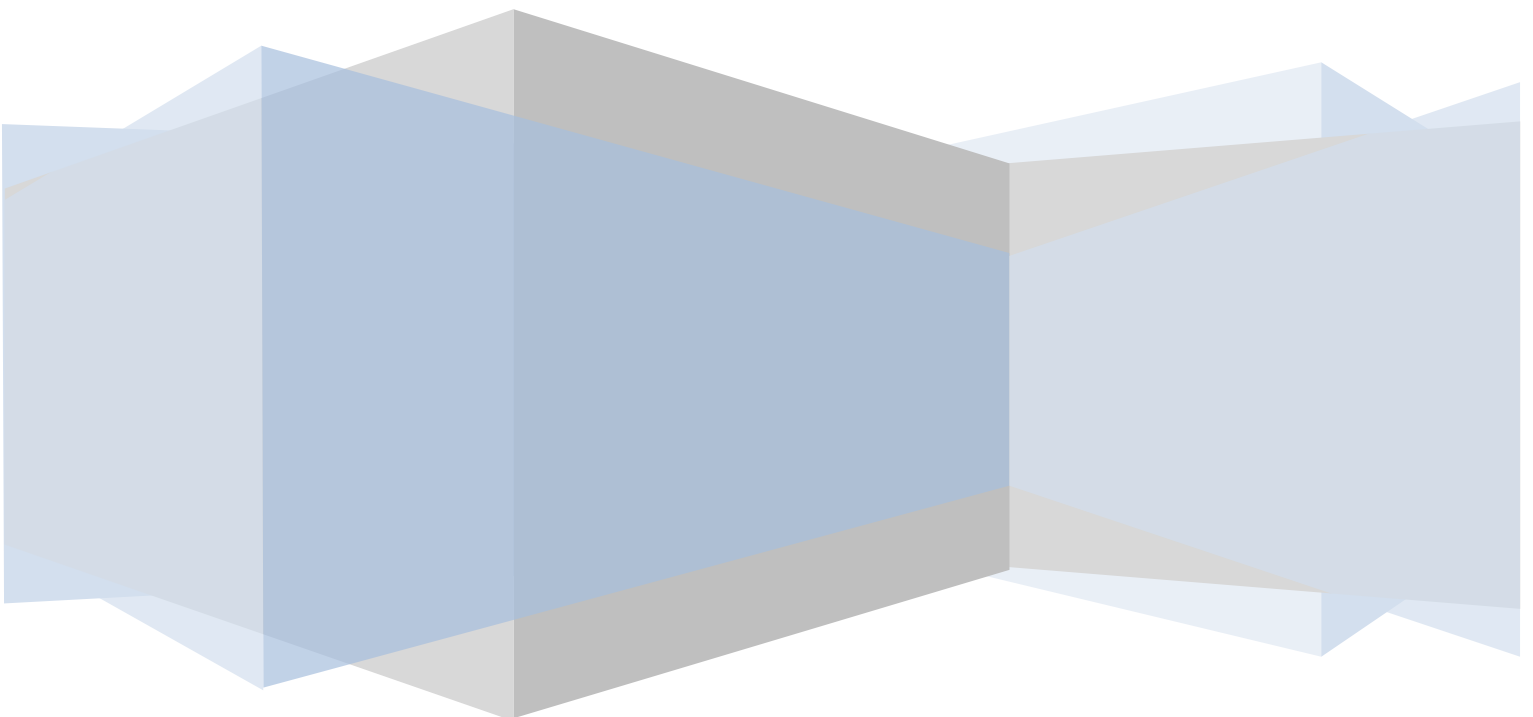


Personal Touch Financial Services Ltd

Getting Started Guide



Personal Touch Directly Authorised



Life:box is the Personal Touch protection proposition for directly authorised advisers

Key Benefits

- Top rates of commission all paid direct
- Easy online 'Life:box' registration process
- Extensive range of products and providers
- FREE quotation software
- Deal direct with providers under unique sub agency
- No loaded premiums

Life:box Providers

How to register on Life:box

- Log into www.personaltouchda.com
- Click on Directly Authorised Zone
- Click on Join Us
- Accept terms and conditions, complete personal details, click submit. **(PLEASE NOTE: This must be completed by the branch Principal as shown on the FSA website for your registration to be valid)**
- Once registered, you do not have to wait for passwords, as the system will allow you to go back in straight away.

Registration with Providers

- To register with the providers you need to open an agency with them
- Click on 'Provider registration' within the protection section
- Follow instructions on how to register with each provider
- Providers will set your agencies up and contact you directly regarding these.

(PLEASE NOTE: If you have existing agencies that just contain protection business and you would like to transfer these to Life:box instead of setting a new account up, email life@personaltouchfs.com with a list of your agencies and we will contact the providers on your behalf)

Access to FREE quotation software

We offer FREE access to the following quotation systems which you can use direct or through the integrated service of Toolbox, a client management back office system.



Once you have registered on www.personaltouchda.com you can apply for access to one of the above systems, the choice is yours. Simply email your request to dasupport@personaltouchfs.com

Submitting business

Once you have an agency with each provider (see 'Registration with Providers' section), you can register to use the electronic system to submit business online

To register online please use the below web addresses or contact numbers:-

Aegon	Call 0845 600 1402 to register	Legal & General	Visit www.legalandgeneral.com/advisercentre
Aviva	Go to www.aviva-for-advisers.co.uk/adviser/site/public/home	Liverpool Victoria	Visit www.liverpoolvictoria-ifa.co.uk
AXA	Visit www.axa.co.uk/advisers	Prudential	Pru require a Unipass Certificate – visit www.unipass.co.uk/howto
Bright Grey	Visit www.brightadviser.co.uk	Scottish Provident	Visit www.scotprov.co.uk
Bupa	Visit www.bupa.co.uk/bupaindividualprotection/online	Synergy	Visit www.synergyprotect.co.uk
Friends Provident	Visit www.friendsprovident.co.uk/ifa	Zurich	Visit www.zurich.co.uk/zurichintermediary/?login

Getting Paid commission

When you register with the providers you will be required to provide bank details.

On completion of the case, the Provider will pay you directly.

For full details on the current rates available please visit the commission tab on our website

If you require any information on the Life:box proposition, please call through to our Dedicated DA Support Team on 0121 767 1020 or visit our website www.personaltouchda.com