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Title – Getting the most out of our online trust journey

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Link to be included – https://www.zurichintermediary.co.uk/advice-matters/trust-is-a-must?WT.mc_id=email_stratpartner_newsbulletin_therightmortgage&utm_source=stratpartner&utm_medium=email&utm_campaign=newsbulletin

Wording –

Placing a policy in trust at outset offers lots of benefits for customers but it's one of the areas you often tell us you need a bit more help and guidance on when it comes to navigating these steps on the adviser portal.

To help make things a little easier, follow these straightforward steps and make placing your customer's policy in trust a breeze.

1. If your application generates a referral it's best practice to wait until after an underwriting decision is made before attempting to complete the trust. If you retrieve an application while it is 'referred', the screen will show online trust is not available. This will reappear once a decision has been made.
2. This is especially important on joint life applications because if one of the lives assured is subsequently declined, this could change the trust arrangements, so getting that certainty is key.
3. Once a decision is made, we'll let you know via an update in your portal. You can then retrieve the application and progress it through to issue and place the policy in trust.

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