

# EB-Life

SWISS LIFE NETWORK PLATFORM  
FOR YOUR INFORMATION AND OUR COLLABORATION

## Pooling illustration

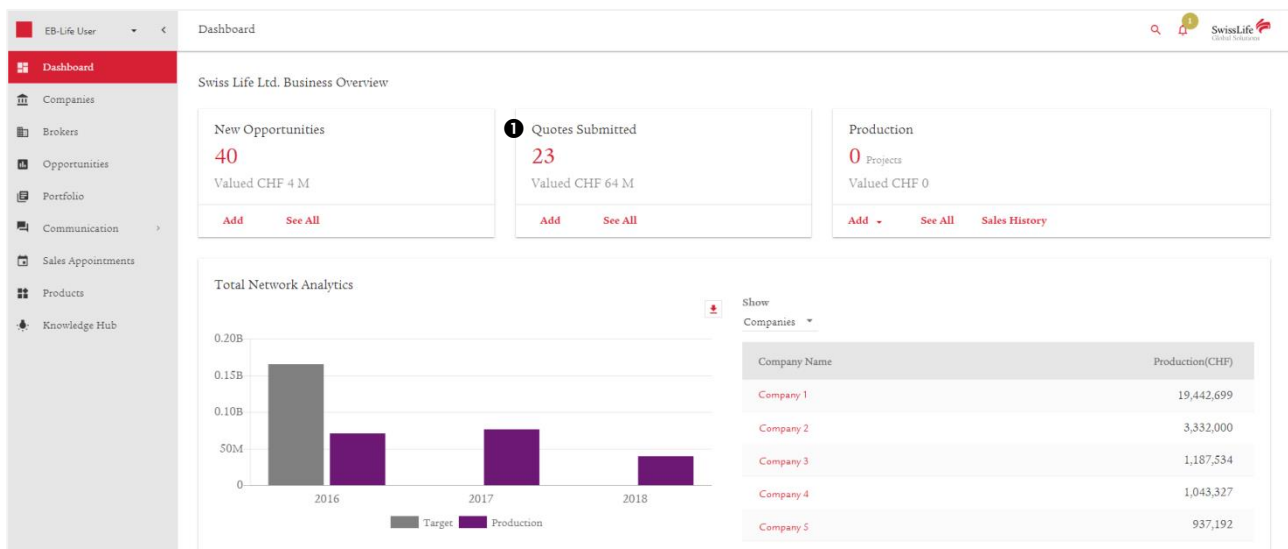
### Login to EB-Life

Connect on <https://www.swisslifecorporateclients.com> (Google Chrome recommended) and login with your Email, your Password and the Activation Code sent by sms.

- ➔ If you do not have access to *EB-Life*, please fill in the form on <http://www.swisslife-global.com/online-services/EB-life/EB-Life-request.html>.
- ➔ If your access is denied or if you face login problems, please contact us at [employeebenefits@swisslife.com](mailto:employeebenefits@swisslife.com).

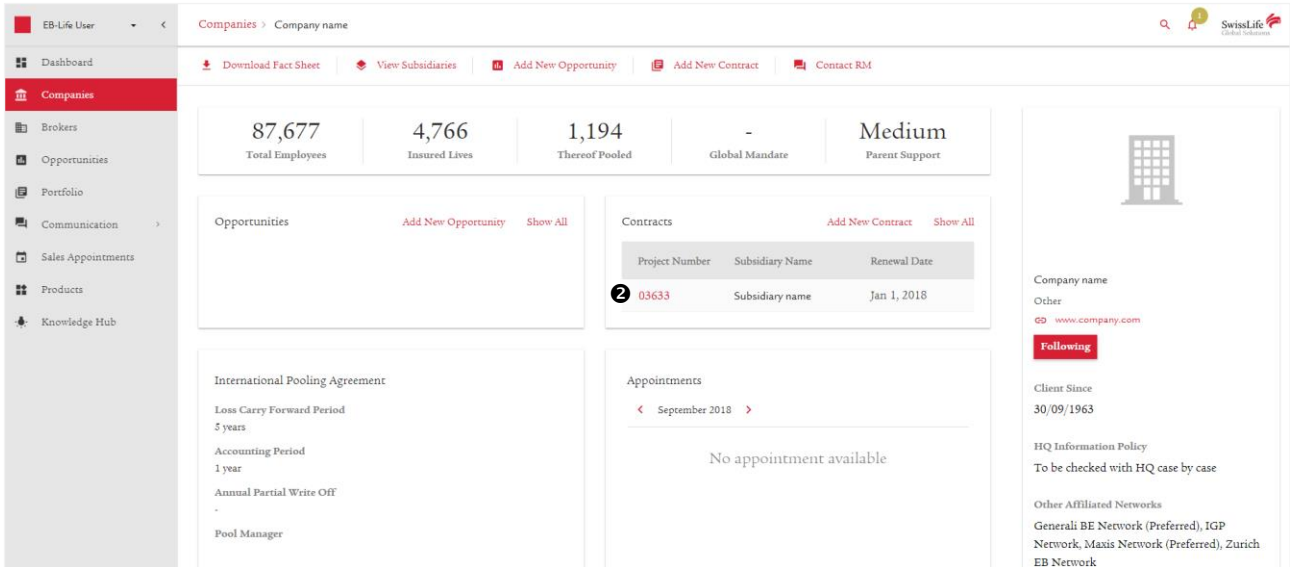
### Search for quotes and contracts eligible for automatized pooling simulations

From the <Dashboard>, you can directly access all the submitted quotes ❶.



This can also be done via the <Opportunities> tab. Sort the data via the <Project Type> drop-down menu in the top right corner of the screen.

Another option is to search for a specific headquarter from the <Companies> tab and then select the respective contract of this client 2.

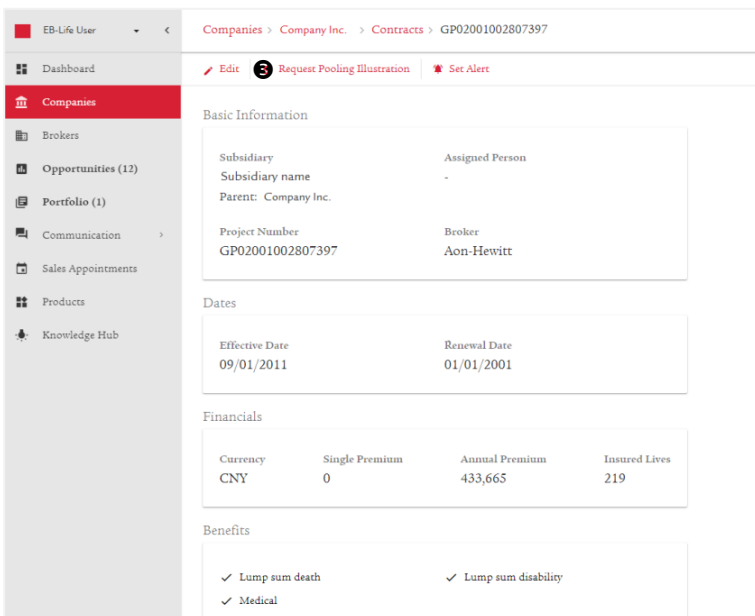


In case you do not find your quote or contract, please register it and wait for the overnight import of the system before requesting the pooling simulation.

Once you have found your quote or contract, you can start the process of automatized pooling simulation.

**Start the process of automatized pooling simulation**

Click on <Request Pooling Illustration> to start the process 3.



EB-Life User
Companies > Company Inc. > Contracts > GP02001002807397

- Dashboard
- Companies
- Brokers
- Opportunities (12)
- Portfolio (1)
- Communication
- Sales Appointments
- Products
- Knowledge Hub

Basic Information

Subsidiary Name * Subsidiary name	Parent: Company Inc.
Project Number * GP02001002807397	Broker Name Aon-Hewitt

4 Benefits

<input type="checkbox"/> Accidental death and dismemberment	<input type="checkbox"/> Critical illness
<input type="checkbox"/> Disability pensions	<input type="checkbox"/> Endowment insurance
<input checked="" type="checkbox"/> Lump sum death	<input checked="" type="checkbox"/> Lump sum disability
<input checked="" type="checkbox"/> Medical	<input type="checkbox"/> Old age pensions
<input type="checkbox"/> Orphans' pensions	<input type="checkbox"/> Short term disability
<input type="checkbox"/> Waiver of premium	<input type="checkbox"/> Widow/er's pensions
<input type="checkbox"/> Not yet defined	

Dates

Effective Date 09/01/2011	Renewal Date 01/01/2001
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5 Financials

Currency * CNY	Single Premium * 0
Annual Premium * 433665	Insured Lives * 219

*Please provide 'Premium Details' or choose 'Based on Experience'*

Death Premium *	Disability Premium *	Medical Premium *
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Based on Experience

6 Write your message \*

0 / 1000

Upload File

7 Broker

YES  NO

*Please provide 'Broker Details' or choose 'Based on Experience'*

Broker Name \*  
Aon-Hewitt

Commission Percentage (%) \*  
0

Based on Experience

8 Local Profit Sharing

YES  NO

9 Claims Experience

*Please provide 'Claim Details' or choose 'Based on Experience'*

Disability Claims *	Death Claims *	Medical Claims *
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Based on Experience

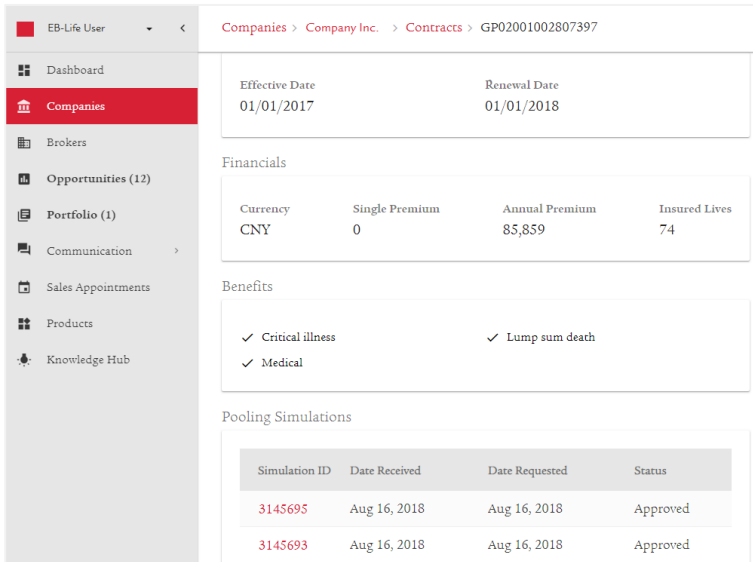
Submit
Cancel

- 4 Choose/modify the <Benefits> (insurance coverages) by ticking the boxes of the ones needed.
- 5 The <Financials> section shows the overall quote that you have entered and still can be updated if needed. Please indicate the split of the premiums for the different coverages by filling in the three fields, if applicable. If the respective benefit is not covered, please put "0". Alternatively you can tick the box <Based on Experience>.
- 6 Use the <Write your message> section to give an update or provide Swiss Life Network with any other additional information. Click on <Upload File> to add an attachment, if applicable.
- 7 Under the <Broker> section, please select if a broker is involved or not. If "YES", please provide with <Broker Details> (name and commission percentage) or tick the box <Based on Experience>. In case a broker is involved but no commissions are paid, please tick "NO" for the submission of the simulation.
- 8 In case there is a <Local Profit Sharing>, tick "YES" and fill in the <Profit Sharing Formula> by indicating either a formula to calculate the dividend or the absolute amount in your local currency. Otherwise, tick "NO".
- 9 Please provide the <Claim Details> by indicating the average total annual claim sum over the past three years for the respective coverage. If the respective benefit is not covered, please put "0". Alternatively, or if there is no claims experience available, tick the box <Based on Experience>.

Once all fields with a "\*" are filled in, click on the <Submit> button in order to finalize your Pooling Illustration.

### Access the pooling simulation results

After a short time period, you can access the result in the respective quote or contract of the client under <Pooling Simulations>, provided the status is showing “Approved”.



EB-Life User < Companies > Company Inc. > Contracts > GP02001002807397

Effective Date: 01/01/2017 | Renewal Date: 01/01/2018

**Financials**

Currency	Single Premium	Annual Premium	Insured Lives
CNY	0	85,859	74

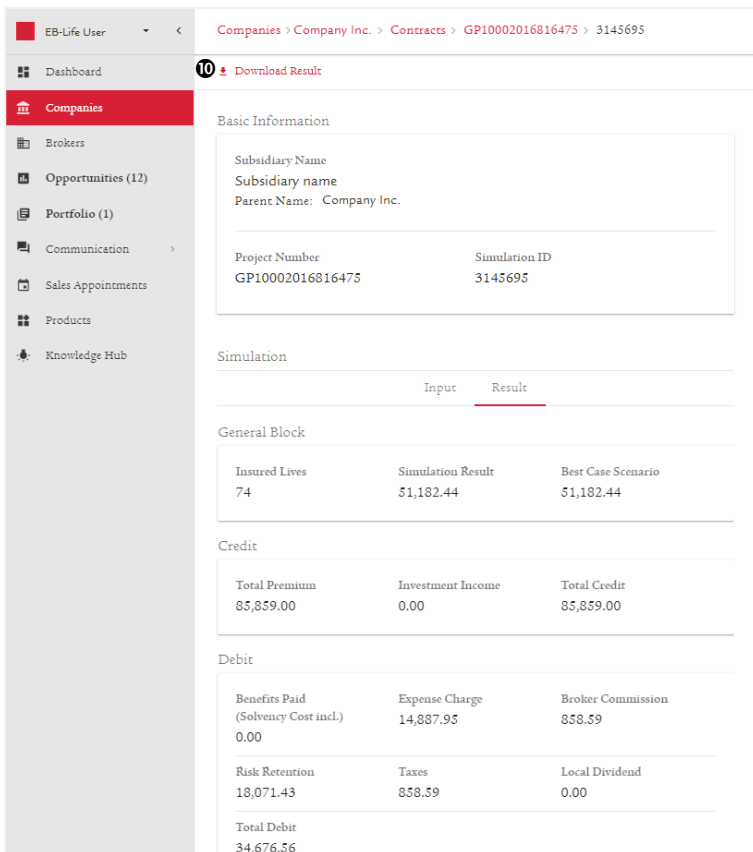
**Benefits**

- Critical illness
- Lump sum death
- Medical

**Pooling Simulations**

Simulation ID	Date Received	Date Requested	Status
3145695	Aug 16, 2018	Aug 16, 2018	Approved
3145693	Aug 16, 2018	Aug 16, 2018	Approved

Click on the relevant <Simulation ID> to access the result, which can also be downloaded as a pdf-file ⑩.



EB-Life User < Companies > Company Inc. > Contracts > GP10002016816475 > 3145695

⑩ Download Result

**Basic Information**

Subsidiary Name  
Subsidiary name  
Parent Name: Company Inc.

Project Number: GP10002016816475 | Simulation ID: 3145695

**Simulation**

Input | Result

**General Block**

Insured Lives	Simulation Result	Best Case Scenario
74	51,182.44	51,182.44

**Credit**

Total Premium	Investment Income	Total Credit
85,859.00	0.00	85,859.00

**Debit**

Benefits Paid (Solvency Cost incl.)	Expense Charge	Broker Commission
0.00	14,887.95	858.59
Risk Retention	Taxes	Local Dividend
18,071.43	858.59	0.00
<b>Total Debit</b>		
34,676.56		

For specific cases, the status “In Review” might be shown. This indicates that the request needs to be reviewed by the actuarial department and will only be available once reviewed and approved by the actuaries.

**Important notice**

Privacy and confidentiality of all your data is guaranteed. All of your information submitted via EB-Life cannot be viewed by any other Network Partner than you. Any of your local contracts, quotations and opportunities and its related information can only be seen by you.