



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.

Search for quotes and contracts eligible for automatized pooling simulations

From the <Dashboard>, you can directly access all the submitted quotes **0**.

EB-Life User • <	Dashboard			Q 🔑 SwissLife 🗧
Dashboard Companies Brokers Opportunities Portfolio Communication Sales Appointments	Swiss Life Ltd. Business Overview New Opportunities 40 Valued CHF 4 M Add See All	Quotes Submitted 23 Valued CHF 64 M Add See All	Production O Projecta Valued CHF 0 Add - See All Sales Histor	у
 Products Knowledge Hub 	Total Network Analytics 0.20B 0.15B	±	ihow Companies * Company Name	Production(CHF)
	0.10B		Company 1	19,442,699
	50M		Company 2 Company 3	3,332,000 1,187,534
	2016	2017 2018	Company 4	1,043,327
	Tare	get Production	Company S	937,192

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.



EB-Life User 🔹 K	Companies > Company name Q 🖉 SwissLife						
Dashboard	🛓 Download Fact Sheet 🔹 View Subsidiaries 🖪 Add New Opportunity 📳 Add New Contract 💐 Contact RM						
💼 Companies							
 Brokers Opportunities 	87,677 Total Employees	4,766 Insured Lives	1,1 Thereof		- Global Mandate	Medium Parent Support	
 Portfolio 						,	
Communication	Opportunities	Add New Opportunity	Show All	Contract	5	Add New Contract Show All	
Sales Appointments				Project	Number Subsidiary Name	Renewal Date	
Products				2 03633	Subsidiary name	Jan 1, 2018	Company name Other
🛊 Knowledge Hub							(D) www.company.com
							Following
	International Pooling Agreer	nent		Appoint	ments		Client Since
	Loss Carry Forward Period 5 years			< Se	ptember 2018 >		30/09/1963
	Accounting Period 1 year		No appointment available		HQ Information Policy To be checked with HQ case by case		
	Annual Partial Write Off Pool Manager						Other Affiliated Networks Generali BE Network (Preferred), IGP Network, Maxis Network (Preferred), Zurich
							EB Network

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						
8	Dashboard		/ Edit 3 Request Pooling Illustration * Set Alert						
â	Companies		Basic Informa	tion					
	Brokers								
	Opportunities (12)		Subsidiary Subsidiary (name	Assigned Person -				
e	Portfolio (1)		Parent: Con	npany Inc.					
-	Communication	>	Project Num		Broker Aon-Hewitt				
۵	Sales Appointments		GP02001002807397 Aon-Hewitt						
==	Products		Dates						
*	Knowledge Hub		Effective Dat 09/01/201		Renewal Date 01/01/2001				
			Financials						
			Currency CNY	Single Premium O	Annual Premium 433,665	Insured Lives 219			
			Benefits						
			✓ Lump su: ✓ Medical	m death	✓ Lump sum disability				



EB-Life User 👻 🤇	Companies > Company Inc. > Contracts	> GP02001002807397		
Dashboard	Basic Information			
G	Subsidiary Name * Subsidiary name Project Number * GP02001002807397 16 / 60 Benefits	Parent: Company Inc. Broker Name Aon-Hewitt		
₩ Products -∲: Knowledge Hub	 Accidental death and dismemberment Disability pensions Lump sum death Medical Orphans' pensions Waiver of premium Not yet defined 	 Critical illness Endowment insurance Lump sum disability Old age pensions Short term disability Widow/er's pensions 		
	Dates Effective Date 09/01/2011	Renewal Date 01/01/2001		
	Currency* CNY Annual Premium*	Single Premium * 0 Insured Lives *		
	433665 219			
	GD Upload File	0 / 1000		
	 Broker YES NO Please provide 'Broker Details' or choo Broker Name * Aon-Hewitt Commission Percentage (*s) * 0 Based on Experience Local Profit Sharing YES NO Claims Experience Please provide 'Claim Details' or choos Disability Claims * Death Claims * Based on Experience Submit Carcel 			

- Choose/modify the <Benefits> (insurance coverages) by ticking the boxes of the ones needed.
- 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>.
- G 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.
- 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.
- 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".
- 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				
5	Dashboard	Effective Date		Renewal Date		
盦	Companies	01/01/2017		01/01/2018		
₽	Brokers	Financials				
	Opportunities (12)	FINALICIAIS				
٦	Portfolio (1)	Currency CNY	Single Premium O	Annual Premium 85,859	Insured Lives 74	
E .	Communication >					
	Sales Appointments	Benefits				
*	Products	✓ Critical ill	ness	🗸 Lump sum death		
•	Knowledge Hub	🗸 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 **0**.

	EB-Life User • • • Companies > Company Inc. > Contracts > GP10002016816475 > 3145695								
5	Dashboard	D 🛓 Download Result							
±	Companies	Basic Information							
₽	Brokers								
	Opportunities (12)	Subsidiary Name Subsidiary name							
Ø	Portfolio (1)	Parent Name: Company Inc.							
튁	Communication >	Project Number Simulation ID							
ā	Sales Appointments	GP10002016816475 3145695							
	Products								
٠	Knowledge Hub	Simulation							
		Input Result							
		General Block							
		Insured Lives 74	Simulation Result 51,182.44	Best Case Scenario 51,182.44					
		Credit							
		Total Premium 85,859.00	Investment Income 0.00	Total Credit 85,859.00					
		Debit							
		Benefits Paid (Solvency Cost incl.) 0.00	Expense Charge 14,887.95	Broker Commission 858.59					
		Risk Retention 18,071.43	Taxes 858.59	Local Dividend 0.00					
		Total Debit 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.