

VICTOR

A fast, easy way to quote, issue, and service policies.

Victor for Brokers user guide



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Victor for Brokers for your business

With financial backing and local experience, Victor helps brokers offer a solution that may suit your clients and are focused on keeping the process simple; using digital technology to help you do what you do best.

Lucrative

Increase profitability through operational efficiency. Victorforbrokers.com.au lets you quote, bind and issue in minutes.

Flexible

You can pick and choose from a range of coverage options to tailor a policy that's made to measure.

Simple

Getting cover has never been so easy. Victorforbrokers.com.au lets you work remotely and manage your business anywhere, anytime.

Start with Victor

Make Victor your first stop and get a quote in minutes.



Let us help you grow your business

Log in at victorforbrokers.com.au and start quoting and issuing today.

Getting started — victorforbrokers.com.au

Don’t have an account?

If you would like to apply for an account with Victor, reach out to connect@victorinsurance.com.au to learn more.

New users

All users must have their own username and password. If you have an account with Victor and would like to access our portal, please contact: connect@victorinsurance.com.au for access. A member of the Victor team will respond promptly.

Once your request has been approved, you will receive an email to complete your account and set up your password.

Returning users

If you already have a Victor account, visit: victorforbrokers.com.au and select **Login** to start quoting!

User types

Standard — Quote and bind policies on our portal.

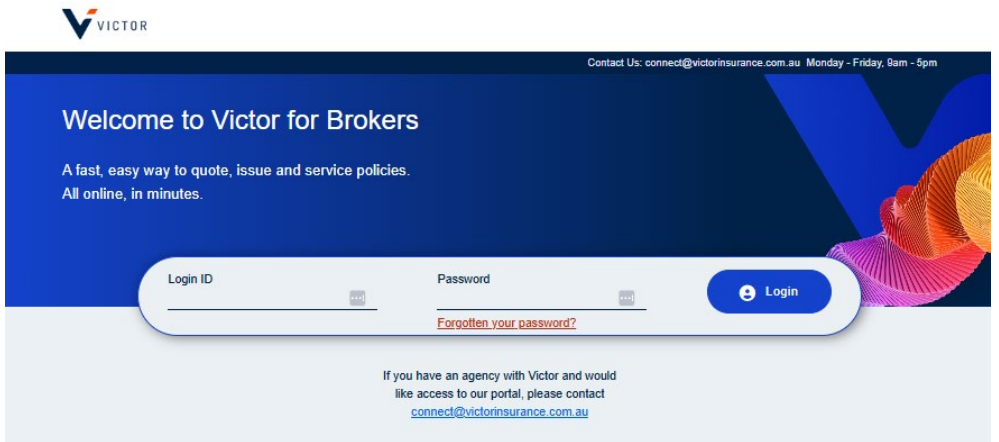
Administrator — Administrator users can quote and bind policies as well as manage login access locally. If you would like to obtain administrator access for your account, email: connect@victorinsurance.com.au. A member of the Victor team will respond promptly.

Multi-factor authentication

Two factor authentication: receive a code as part of your login process to either your registered email address or mobile number.

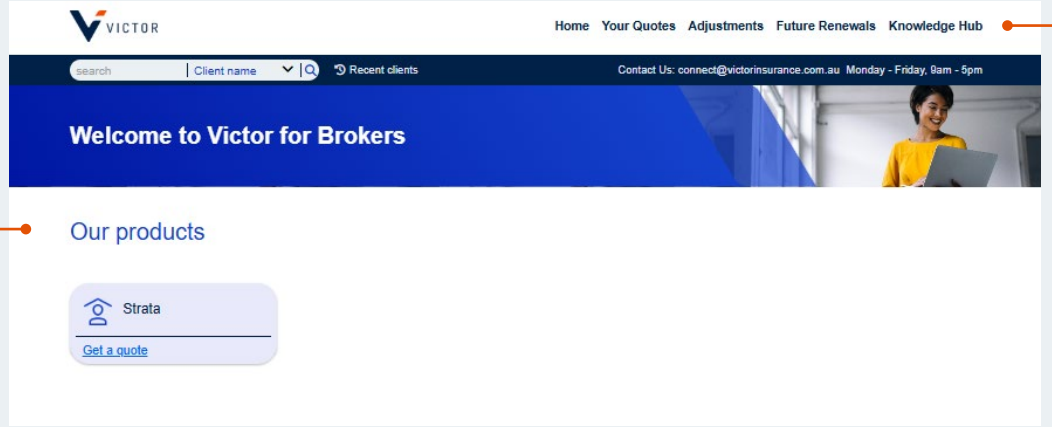
Registration or login questions?

Email: connect@victorinsurance.com.au



Navigate the homepage

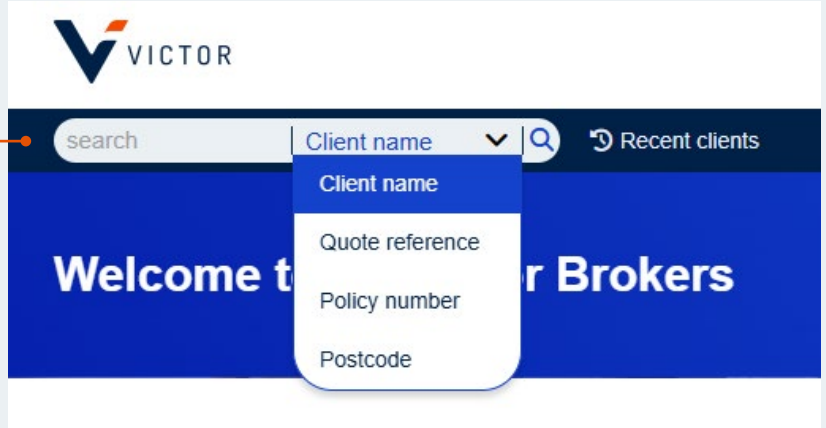
Products available to you will appear here. You can specify online only products or search based on trade to see the cover we can offer.



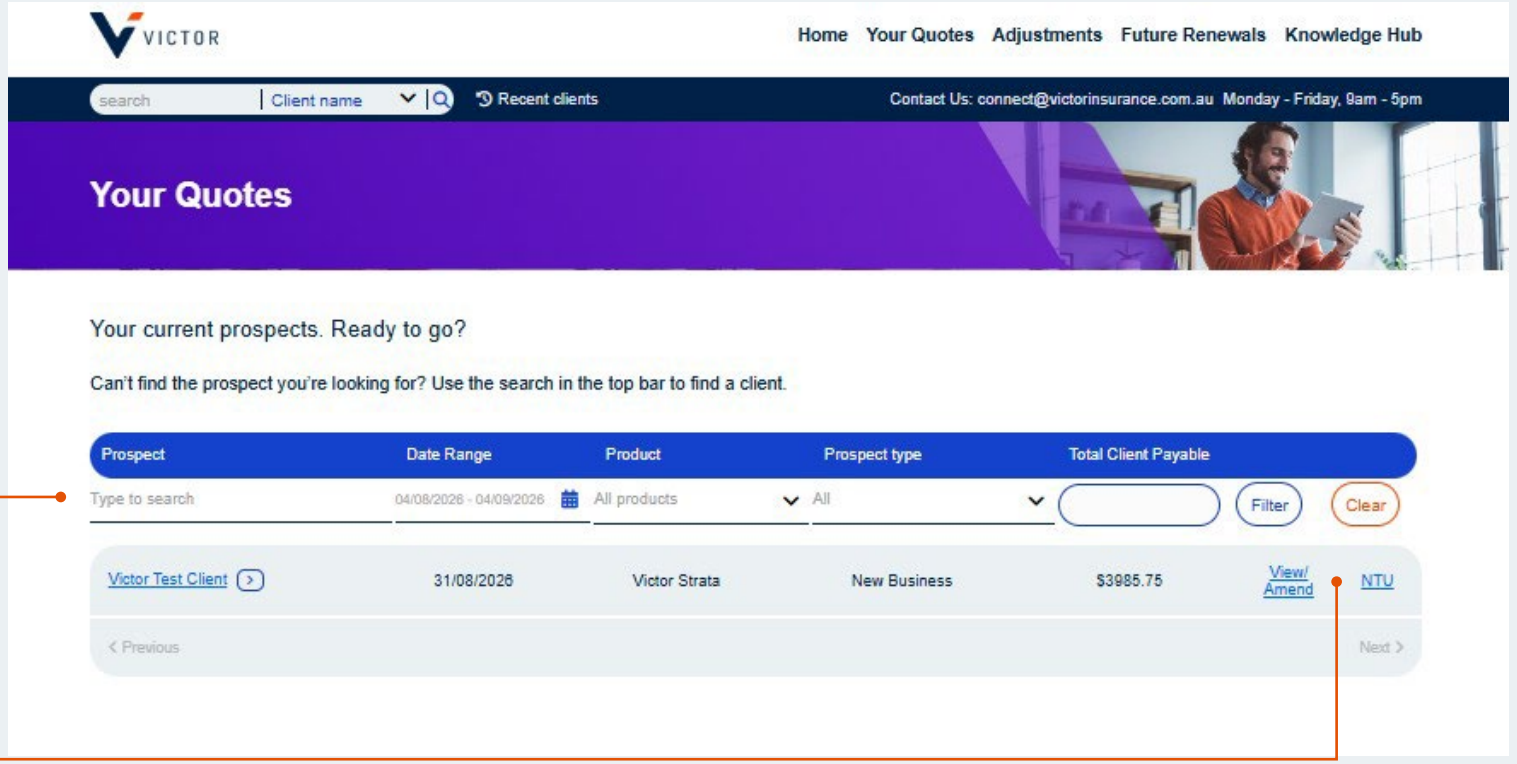
Dashboards
Your quotes, adjustments future renewals (see next page for more guidance).

Knowledge Hub
A suite of videos to support your use of the portal, product commissions and information on our finance facility.

Search for specific clients, quotes or policies.



Dashboards



Search for specific clients by name, date or product.

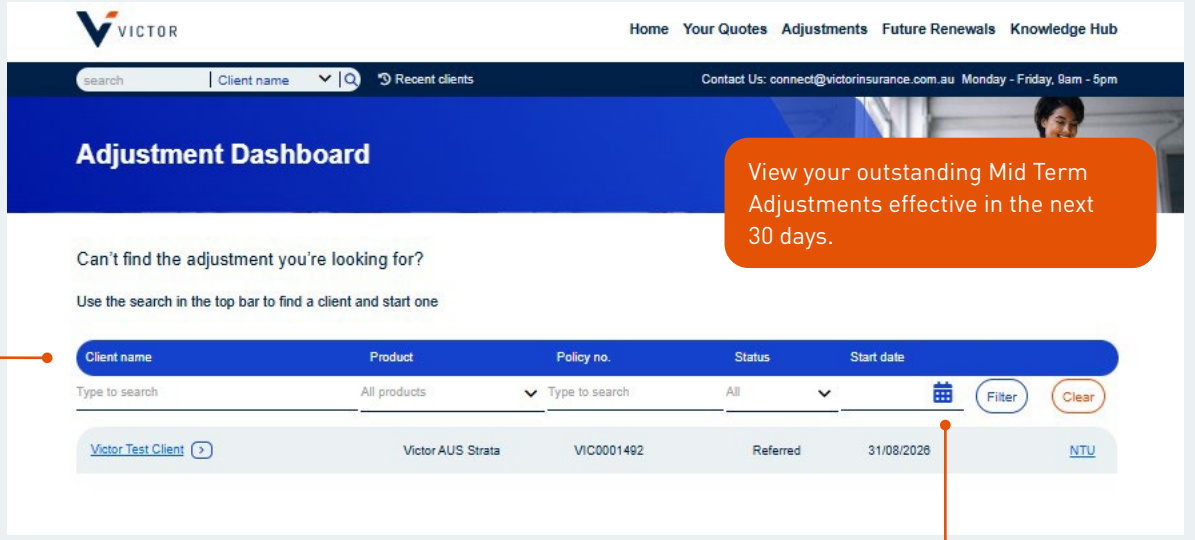
View the quote, amend the risk information or mark as not taken up (NTU) if no longer needed.

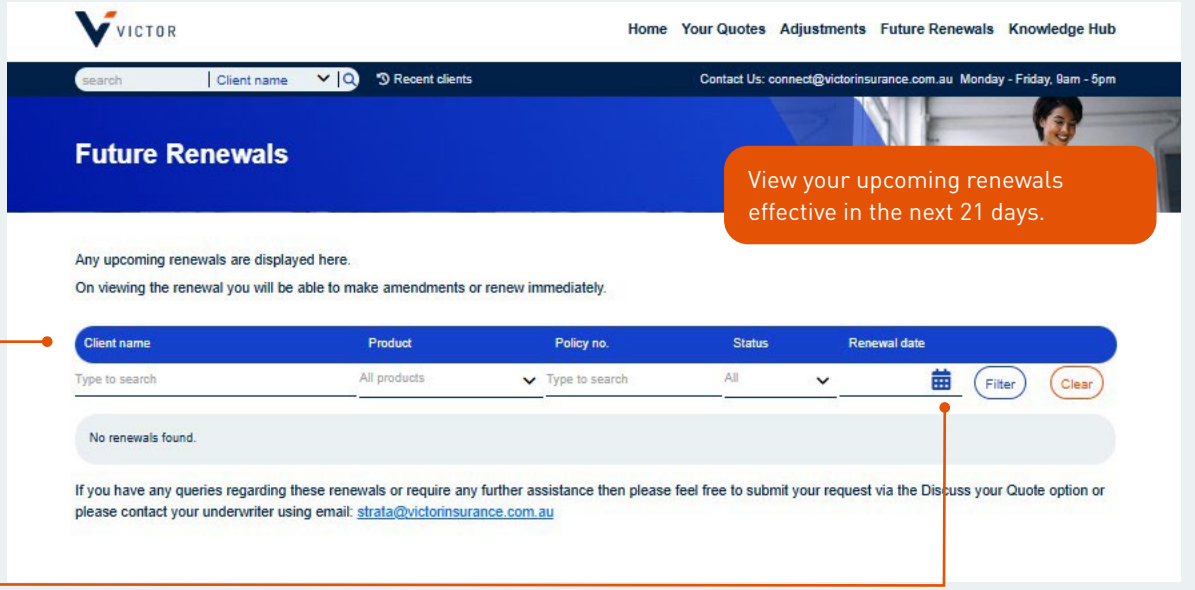
Dashboards

Adjustments and renewals

Search or filter the data for specific clients by name, policy number, product , status, or start/ renewal date.

View the adjustment or renewal quote and NTU if no longer needed.

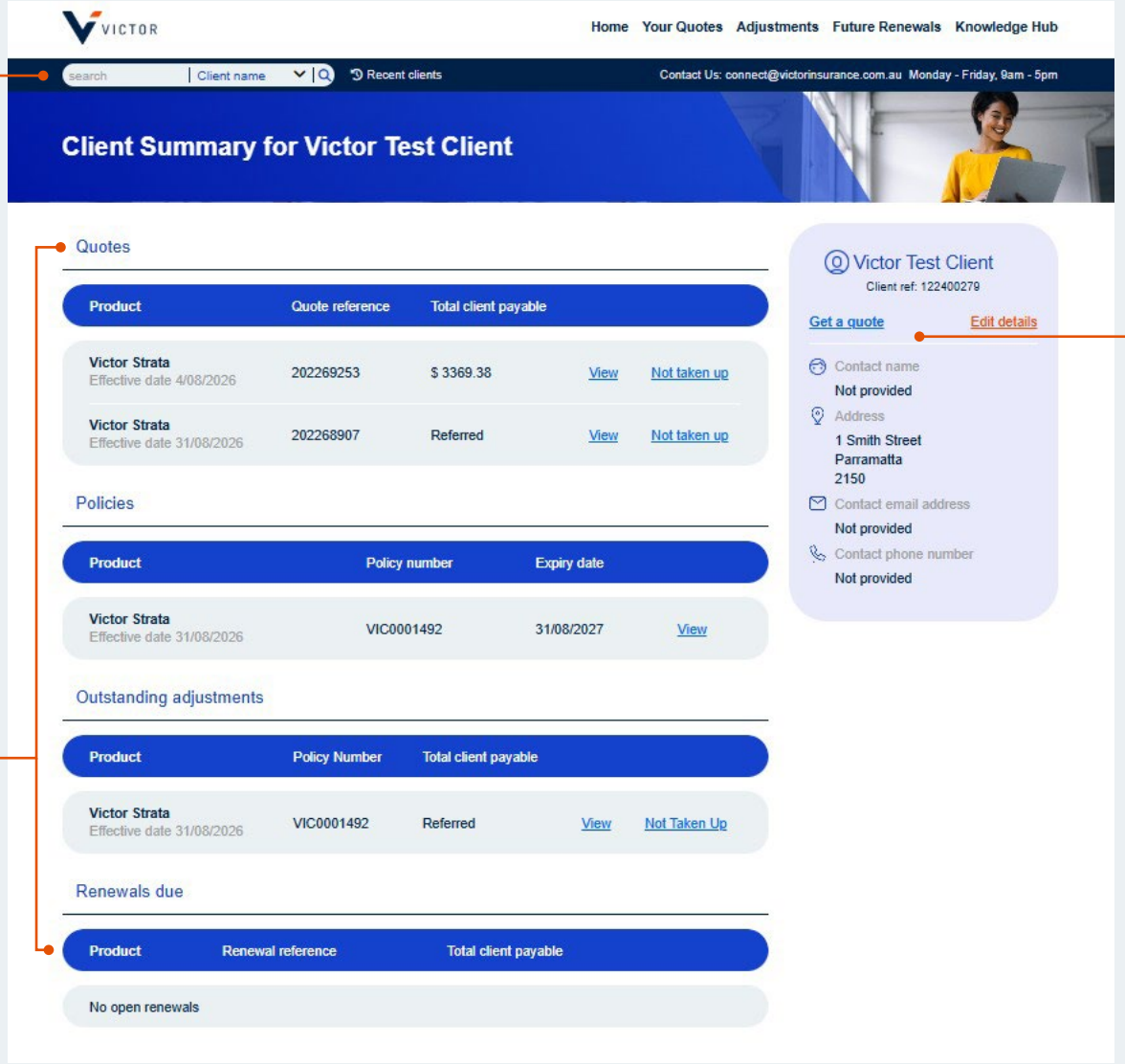




Navigating client records

Search for existing clients via client name, quote reference, policy number, or postcode. Recent clients show all records accessed during this portal session.

Quotes, policies, adjustments, and renewals will all be visible on your client summary for you to progress with or NTU.



Want a new quote for this client? Click **Get a quote** to proceed and select your product.

Quote summary

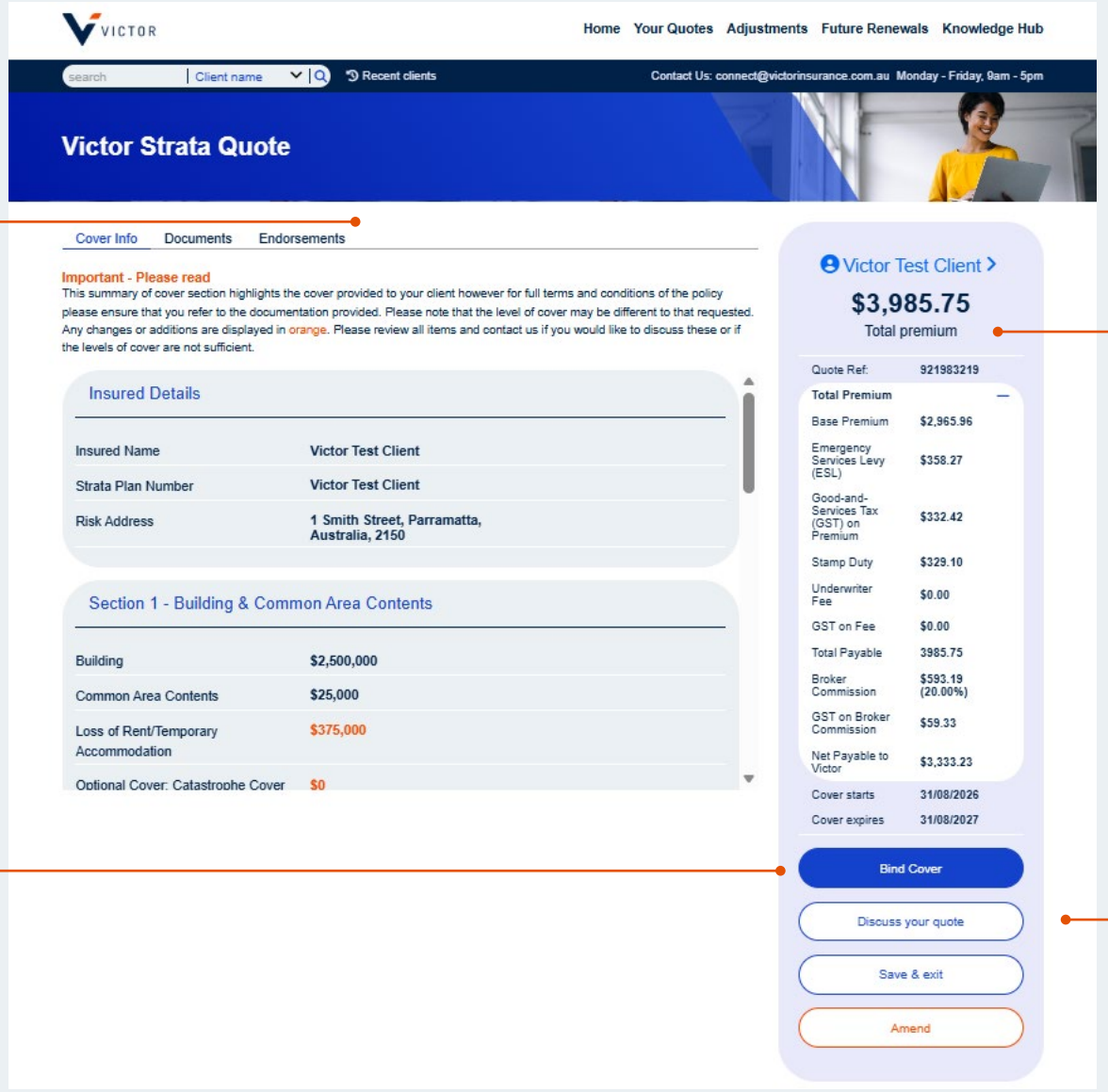
Cover Info
Summary of sectional cover information.

Documents
Access all policy documents and email them to yourself.

Commission Override
Adjust your commission (subject to availability).

Endorsements
Summary of endorsements applied to the policy.

Ready to accept? Select Bind Cover to access policy documents and Certificate of Currency



Summary of the premium, commission, policy fee and GST as well as cover dates.

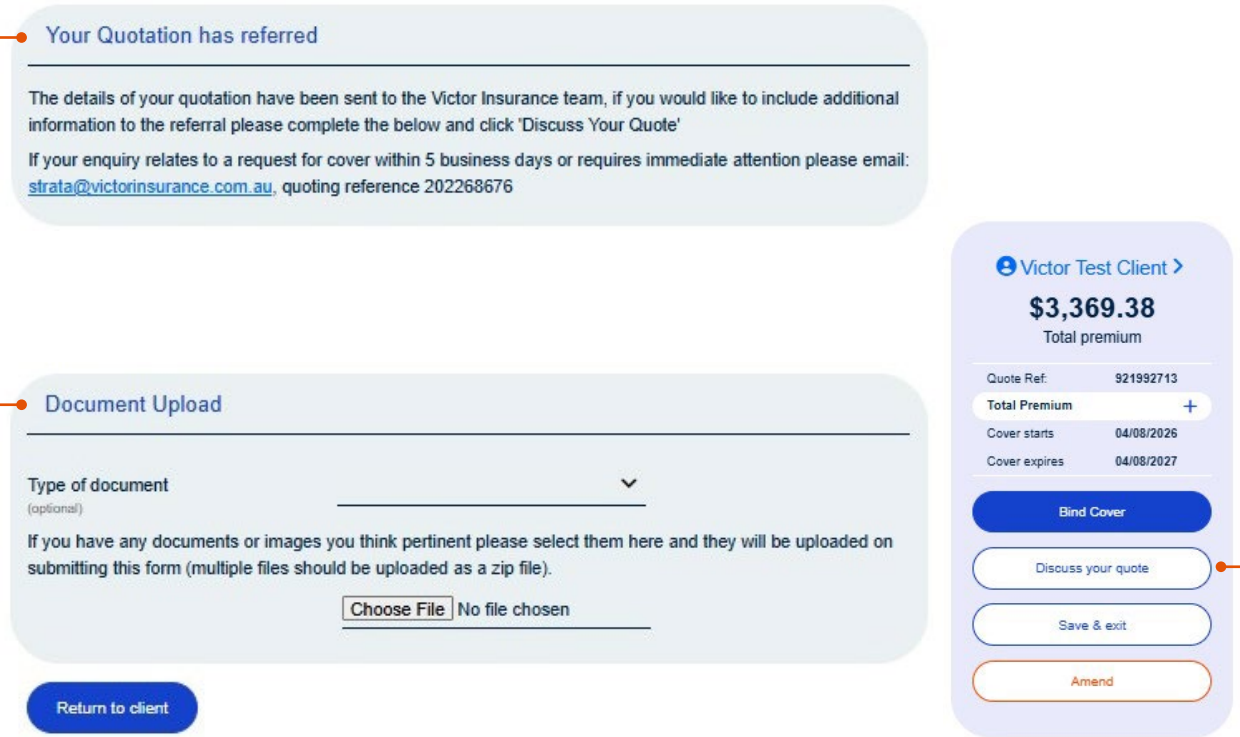
Send a message to underwriters to **Discuss your quote**, **Amend** any information entered or **Save & exit** to return to this at a later date.

Referrals

Some referrals may generate an indicative premium, subject to underwriter review. If a referral is triggered without an indicative premium, the risk is referred to the underwriting team for assessment.

Don't forget!

Add in any supporting information that you would like underwriters to review when preparing formal terms.



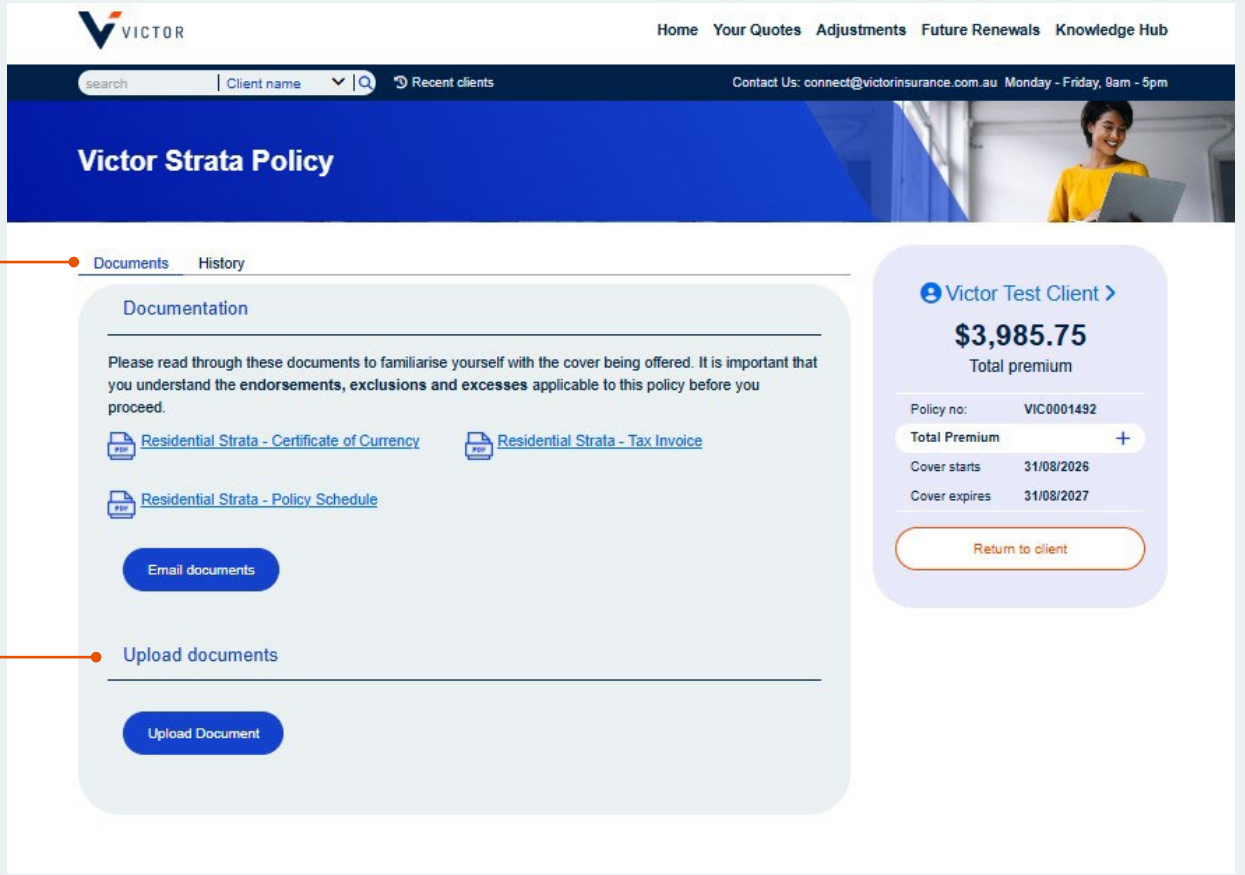
Make sure to click the Discuss your Quote button for underwriters to review the details and provide you with a formal quotation.

Policy summary

Documents
Access all policy documents and email them to yourself.

History
View high level details of policy versions previously processed.

Submit any additional information to underwriters.





FAQs

How do I login for the first time? Visit victorforbrokers.com.au and click "login". Enter your username and password.

What do I do if I've forgotten my password or my account is locked? Please click the "reset your password" link on the login page. If resetting your password does not resolve the issue, please email connect@victorinsurance.com.au

What do I do if I've forgotten my login ID? Your login ID is the email address used to set up your account.

Can I get a Victor for Brokers demo for me and/or my team? Absolutely! Please reach out to your business development contact to arrange this.

My clients' renewal is due in 35 days but I can't find the terms? Our renewal terms are available 30 days ahead of renewal as standard. If you need these earlier than this, please reach out to our underwriters to discuss further.

How do I cancel a policy? Cancellations need to be agreed with underwriters and therefore cannot be processed on the portal. Please reach out to our underwriting teams who will be happy to assist you further.

I need to backdate a quote but the portal isn't allowing me to do so? Backdated cases need to be agreed with underwriters before cover can proceed. Please reach out to our underwriting teams who will be happy to assist you further.

I cannot locate an existing client record on the portal? Please reach out to connect@victorinsurance.com.au for further assistance here so that we can check your access and the account attached to the client record.

Why don't I have the option to amend a policy/start an Mid Term Adjustment? This is usually because there is already an in-flight business event in progress (either an adjustment or renewal). Please reach out to our underwriters for further assistance here and we can assist you with processing any changes.

How do I report issues with connect@victorinsurance.com.au?

Please send our underwriters as much information as possible, including:

- Date and time of error
- Login username
- Where you were in the portal journey when the error occurred
- Error message reference

Logging in

If you are a first time user or experience issues logging in, email: connect@victorinsurance.com.au for assistance.

Billing questions

Email: ao.acturis.victorau@marsh.com

Contact us

connect@victorinsurance.com.au

Monday – Friday, 9am – 5pm (AET)

Visit us at victorinsurance.com.au to learn more.

Victor Insurance Pty Ltd (ABN 11 146 607 838) ("Victor Insurance") is an underwriting agency and an authorised representative (AR No. 403803) of Marsh Pty Ltd (ABN 86 004 651 512, AFSL 238983) and is not an insurer. Victor Insurance is a business of Marsh.

This document is for illustrative purposes only and is not a contract. It is intended to provide a general overview of the program described. Please remember only the insurance policy can give actual terms, coverage, amounts, conditions and exclusions. Program availability and coverage are subject to individual underwriting criteria.

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