

Welcome to the Pacific Indemnity Broker Portal

Click each heading to jump to that section within the document

What's in this guide?

How to Access the Portal

- ☰ Activating Your Account
- ☰ Setting your password

Quick Start Guide

- ☰ A quick reference of what the Portal can do and how it works - **Auto Quote, Referred Quotes, Send Link to Client, Binding Cover, Resending Policy Documents**. For more detailed instructions, including **How to Access the Portal**, click on each heading

Who can I contact?

Resetting Your Password

Dashboard

- ☰ Lists and Functions

New Business Quotes

- ☰ Over 1,700 ANZSIC classified Business Activities & 470 Professions to choose from, with > 50% having the potential to auto-rate
- ☰ Get instant indications of price
- ☰ NSW Small Business Insurance Duty Exemption Declaration question – *no exemption document required*

Send link to your Client

- ☰ Your client can review the detail in the proposal form and submit their confirmation of answers back to you before you submit it to us

Summary Screen

- ☰ A summary of your quote, alternative limit/s and excess options

Navigation across the top of the screens

- ☰ Learn how to navigate through the screens using the links at the top of the screens

Print/Download Proposal

- ☰ Save or print a copy of the proposal answers in a PDF file

Bind Cover

- ☰ Immediately receive your Policy Documents and Certificate of Currency

Refer to or Message the Underwriter

- ☰ For an account you are trying to win, requesting altered terms, or any other reason, you can type a message, upload documents and 'Refer to Underwriter' to review the automatically produced quote

Referred Quotes

- ☰ Receive a response to your Referred quotes within 24 hours (on the next business day)

Renewal Quotes

- ☰ Expiring terms based on previously disclosed information are released to the Portal, and can be bound subject to there being no material change to the risk and subject to qualifying criteria

How to Search; Expired Quotes & Resending Policy Documents

- ☰ All quotes and policies linked to your brokerage are visible on the Portal
- ☰ Ability to email Policy Schedule and/or Certificate of Currency from Policy List

HOW TO ACCESS THE PORTAL

Activating Your Account

When first registered on the Broker Portal, you will receive two emails:

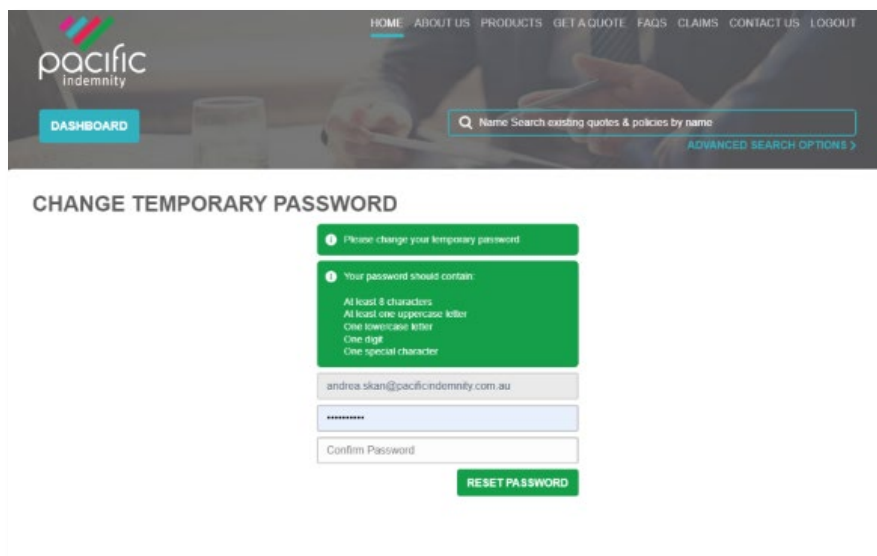
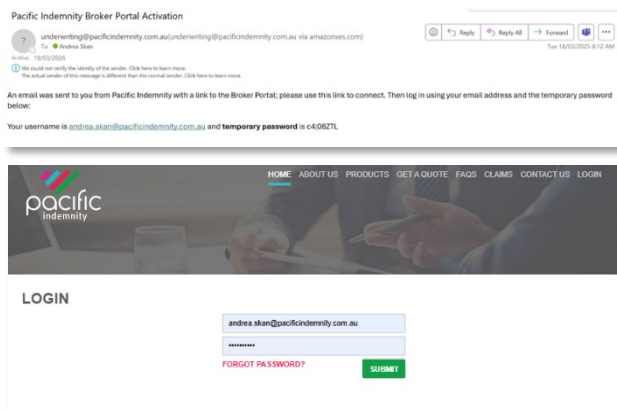
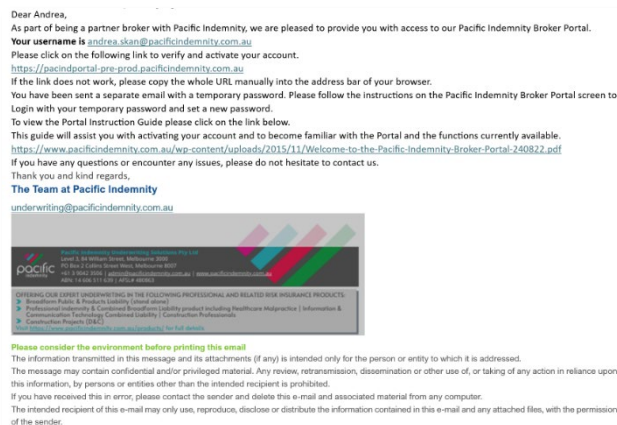
1. Welcome to the Pacific Indemnity Broker Portal email containing a link to the portal and requesting you to verify and activate your account
 ★ *Bookmark or save as Favourite in your Browser to return easily at any time.*
2. Pacific Indemnity Broker Portal Activation email that contains your temporary password.

Click the [link](#) to access the login screen, enter your username and temporary password, click Submit. You will be required to set a new password.

Setting Your Password

When asked to set a new password, enter the New Password you wish to set for the Portal, then re-enter the Password to confirm the password. Click Submit.

Details of Password requirements are provided with clear instructions on screen to assist you.



If you successfully set your new password, you will be automatically navigated to the DASHBOARD

QUICK START GUIDE

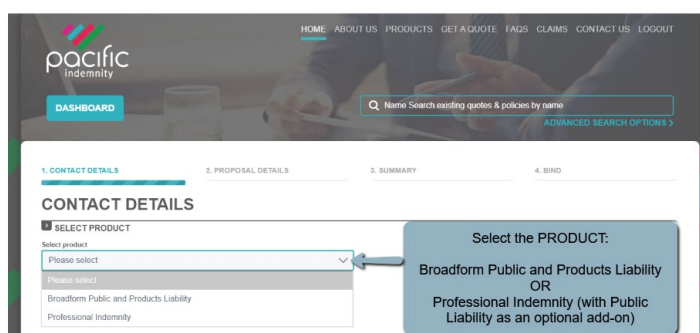
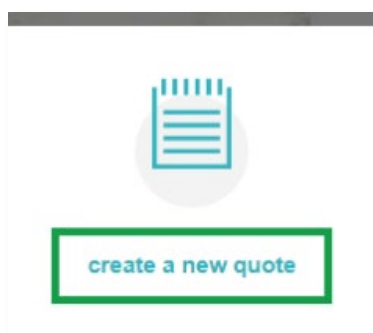
This provides a quick reference as to what the Portal can do and how it works - **Auto Quote, Referred Quotes, Send Link to Client, Binding Cover**. For more detailed instructions, including how to Access the Portal, please click [here](#) or click each sub-heading.

START A NEW QUOTE

Click create a new quote:

From the drop-down box, select the PRODUCT then click on

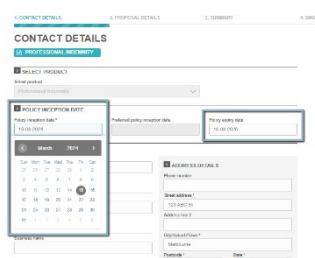
CREATE >



Select the PRODUCT:
Broadform Public and Products Liability
OR
Professional Indemnity (with Public Liability as an optional add-on)

AUTO QUOTES – Once the CONTACT DETAILS and PROPOSAL DETAILS have been entered (see below), a quote indication will be generated. A formal binding quote can be emailed and bound online.

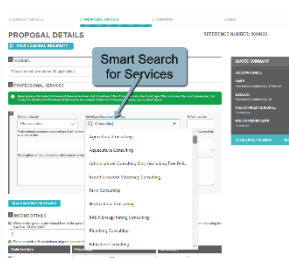
CONTACT DETAILS



- ▶ Select the period of insurance
- ▶ Enter:
 - ✓ Legal name of Insured
 - ✓ Any additional Legal, Trading, Business and/or Individual Names
 - ✓ ABN
 - ✓ Website
 - ✓ Address Details

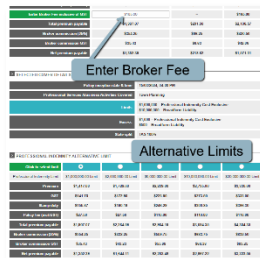
▶ Click **NEXT >**

PROPOSAL DETAILS



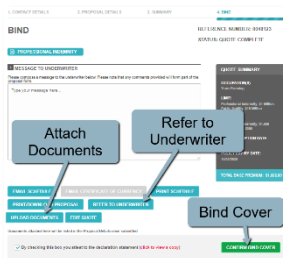
- ▶ Complete the proposal
- ▶ [SEND LINK TO CLIENT](#) for their review (optional)
- ▶ Go BACK
- ▶ SAVE & EXIT
- OR
- ▶ Click on **SUBMIT** to progress to the SUMMARY screen

SUMMARY Screen



- ▶ Enter a Broker Fee (optional)
- ▶ Alternative Limits and/or Excesses are available for selection
- ▶ [Email the Quote Summary](#)
- ▶ PRINT/DOWNLOAD PROPOSAL
- OR
- ▶ Click on **NEXT >** to go to the BIND screen

BIND Screen



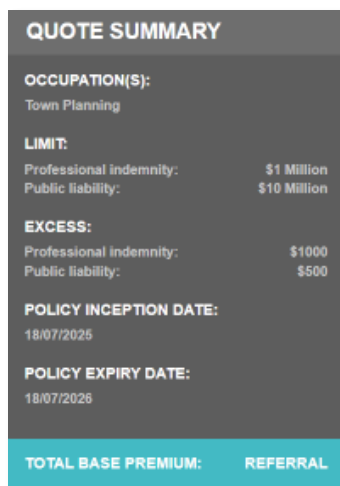
Option to:

- ▶ EMAIL SCHEDULE
- ▶ EMAIL CERTIFICATE OF CURRENCY
- ▶ PRINT SCHEDULE
- ▶ PRINT/DOWNLOAD PROPOSAL
- ▶ [Refer to Underwriter](#)
- ▶ UPLOAD DOCUMENTS
- ▶ EDIT Quote
- OR
- ▶ [BIND COVER](#)

REFERRED QUOTES – detail(s) need to be reviewed by an underwriter before a formal response can be provided. If a quote request is accepted, this will appear as “Quote Complete” or “Approved” status in your Dashboard.

You will receive a response within 24 hours (on the next business day).

Floating Quote Summary



QUOTE SUMMARY

OCCUPATION(S):
Town Planning

LIMIT:
Professional indemnity: \$1 Million
Public liability: \$10 Million

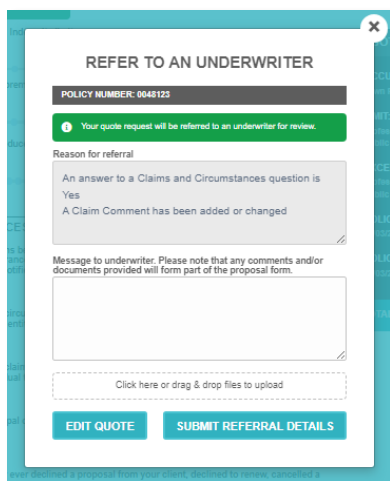
EXCESS:
Professional indemnity: \$1000
Public liability: \$500

POLICY INCEPTION DATE:
18/07/2025

POLICY EXPIRY DATE:
18/07/2026

TOTAL BASE PREMIUM: REFERRAL

Referral Pop-Up



REFER TO AN UNDERWRITER

POLICY NUMBER: 0048123

Your quote request will be referred to an underwriter for review.

Reason for referral
An answer to a Claims and Circumstances question is Yes
A Claim Comment has been added or changed

Message to underwriter. Please note that any comments and/or documents provided will form part of the proposal form.

Click here or drag & drop files to upload

EDIT QUOTE **SUBMIT REFERRAL DETAILS**

Response Within 24 Hours

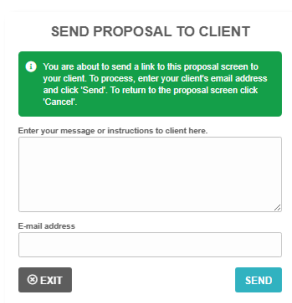
Receive a response from our Pacific Indemnity Underwriters on the next business day

- ▶ Accepted & Quote Complete or Approved; or
- ▶ Request for more information; or
- ▶ Declined to quote

SEND LINK TO CLIENT –a link is sent to the email address nominated by you.

The link is valid for 10 days and allows your client to review and/or change details in the CONTACT DETAILS and PROPOSAL DETAILS screens

SEND LINK TO CLIENT Pop-Up



SEND PROPOSAL TO CLIENT

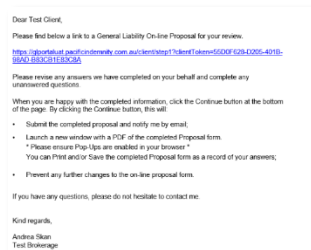
You are about to send a link to this proposal screen to your client. To process, enter your client's email address and click 'Send'. To return to the proposal screen click 'Cancel'.

Enter your message or instructions to client here.

E-mail address

EXIT **SEND**

Client Receives Link In Email



Dear Test Client,

Please find below a link to a General Liability On-line Proposal for your review:

<https://portaltest.pacificindemnity.com.au/indemnting?Token=5500F628-4205-421B-B94D-B33C211E0C36>

Please review any answers we have completed on your behalf and complete any unanswered questions.

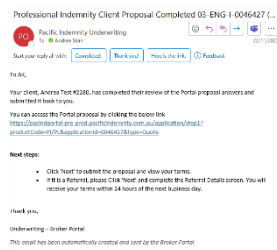
When you are happy with the completed information, click the Continue button at the bottom of the page. By clicking the Continue button, this will:

- Submit the completed proposal and notify me by email.
- Launch a new window with a PDF of the completed Proposal form.
- Please ensure Pop-Ups are enabled in your browser.
- You can Print and/or Save the completed Proposal form as a record of your answers.
- Prevent any further changes to the on-line proposal form.

If you have any questions, please do not hesitate to contact me.

Kind regards,
Andrea Skam
Test Underwriter

Client Completes & Returns



Professional Indemnity Client Proposal Completed 03-ENG-1-0046427 (...)

Pacific Indemnity Underwriting
100, 100, 100

Start your reply with: **Continue** **Thank you** **Back to the BA** **Feedback**

To All,

Your client, Andrea Test #2386, has completed their review of the Portal proposal answers and submitted a link to you.

You can access the Portal proposal by clicking the below link:
<https://portaltest.pacificindemnity.com.au/indemnting?Token=5500F628-4205-421B-B94D-B33C211E0C36>

Next steps:

- Click 'Next' to submit the proposal and also your terms.
- If it is a referral, please click 'Next' and complete the Referral Details screen. You will receive your terms within 24 hours of the next business day.

I thank you,

Underwriting – Broker Portal

This email has been automatically created and sent by the Broker Portal

Broker to Submit Proposal to Underwriter

You are advised by email that the proposal is completed and ready to submit for a quote

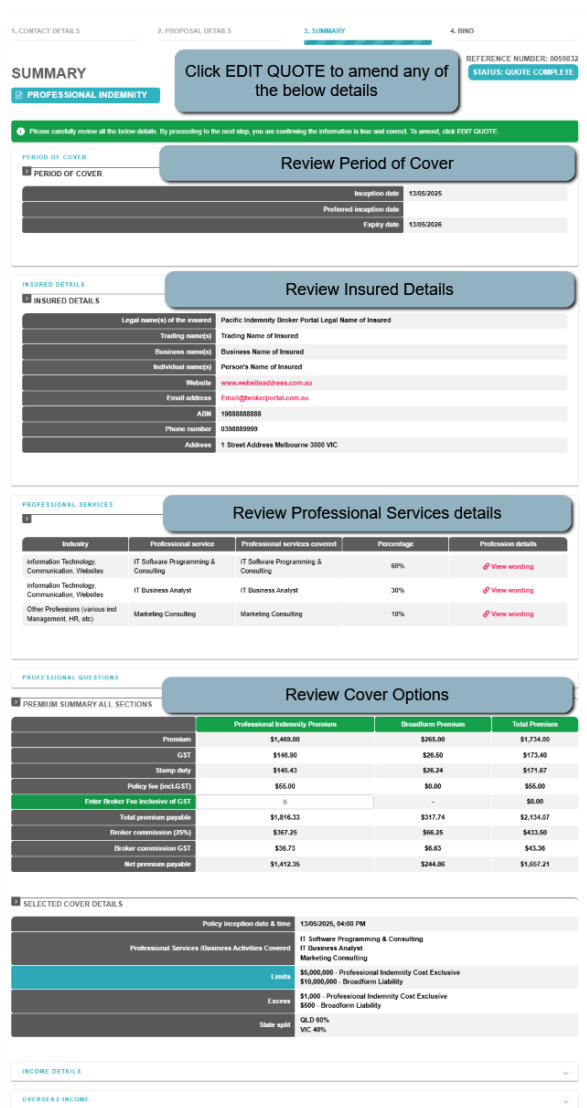
BINDING COVER - Review the SUMMARY page carefully. By proceeding to the next step, you are confirming the information is true and correct. To amend, click EDIT QUOTE.

Review Inception and Expiry Date, Cover Details and Options

- ▶ Inception Date must be equal to or, no more than 3 months, greater than today's date
- ▶ Amend Expiry Date (if the client requires a policy term not equal to 12 months)
- ▶ Review Alternative Limits and Excess Options
- ▶ Update cover options in PROPOSAL DETAILS or SUMMARY screen
- ▶ EDIT QUOTE to amend

Confirm the Declaration & Bind Cover

- ▶ From SUMMARY screen go directly to **BIND** cover screen; OR click on **NEXT >**



SUMMARY
1. PROFESSIONAL INDEMNITY

Click EDIT QUOTE to amend any of the below details

REFERENCE NUMBER: 0059832
STATUS: QUOTE COMPLETE

1. Please carefully review all the below details. By proceeding to the next step, you are confirming the information is true and correct. To amend, click EDIT QUOTE.

PERIOD OF COVER
Review Period of Cover

Field	Value
Inception date	13/05/2025
Preferred inception date	
Expiry date	13/05/2026

INSURED DETAILS
Review Insured Details

Field	Value
Legal name(s) of the insured	Pacific Indemnity Broker Portal Legal Name of Insured
Trading name(s)	Trading Name of Insured
Business name(s)	Business Name of Insured
Individual name(s)	Person's Name of Insured
Website	www.websitebusiness.com.au
Email address	Email@brokerportal.com.au
ABN	1000000000
Phone number	0300000000
Address	1 Street Address Melbourne 3000 VIC

PROFESSIONAL SERVICES
Review Professional Services details

Industry	Professional service	Professional services covered	Percentage	Profession details
Information Technology, Communication, Websites	IT Software Programming & Consulting	IT Software Programming & Consulting	80%	View wording
Information Technology, Communication, Websites	IT Business Analyst	IT Business Analyst	30%	View wording
Other Professions (various incl Management, HR, etc)	Marketing Consulting	Marketing Consulting	10%	View wording

PROFESSIONAL QUESTIONS
Review Cover Options

PREMIUM SUMMARY ALL SECTIONS

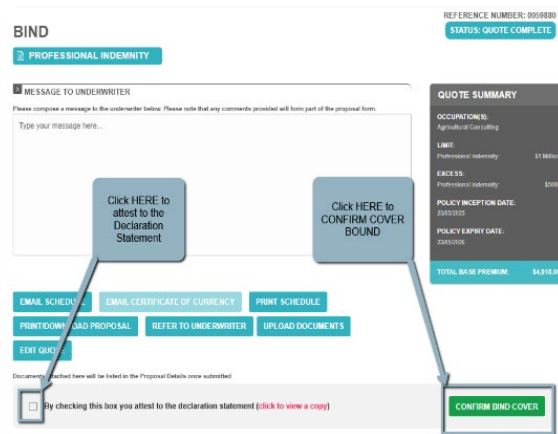
	Professional Indemnity Premium	Broadform Premium	Total Premium
Premium	\$1,445.00	\$265.00	\$1,710.00
GST	\$145.00	\$26.50	\$171.50
Stamp duty	\$145.43	\$26.24	\$171.67
Policy fee (incl GST)	\$55.00	\$0.00	\$55.00
Enter Broker Fee Inclusive of GST	0	-	\$0.00
Total premium payable	\$1,810.33	\$317.74	\$2,128.07
Broker commission (20%)	\$362.06	\$63.55	\$425.61
Broker commission (GST)	\$36.73	\$6.35	\$43.08
Net premium payable	\$1,412.36	\$244.19	\$1,656.55

SELECTED COVER DETAILS

Field	Value
Policy inception date & time	13/05/2025, 04:00 PM
Professional Services Business Activities Covered	IT Software Programming & Consulting IT Business Analyst Marketing Consulting
Limit	\$5,000,000 - Professional Indemnity Cost Exclusive \$10,000,000 - Broadform Liability
Excess	\$1,000 - Professional Indemnity Cost Exclusive \$0.00 - Broadform Liability
State split	QLD 80% VIC 40%

INCOME DETAILS

OVERSEAS INCOME



BIND
2. PROFESSIONAL INDEMNITY

MESSAGE TO UNDERWRITER

Please compose a message to the underwriter below. Please note that any comments provided will form part of the proposal form.

Type your message here...

Click HERE to attest to the Declaration Statement

Click HERE to CONFIRM COVER BOUND

QUOTE SUMMARY

REFERENCE NUMBER: 0059832
STATUS: QUOTE COMPLETE

OCCUPATIONS
Agriculture Consulting

LIMIT
Professional Indemnity \$1,000,000

EXCESS
Professional Indemnity \$1,000

POLICY INCEPTION DATE
13/05/2025

POLICY EXPIRY DATE
13/05/2026

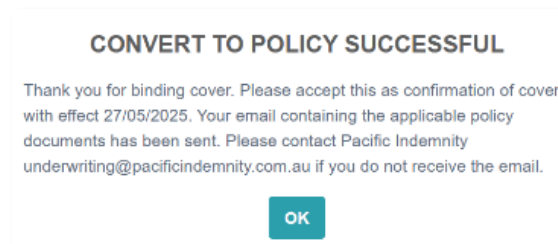
TOTAL GROSS PREMIUM
\$1,710.00

EMAIL SCHEDULE
EMAIL CERTIFICATE OF CURRENCY
PRINT SCHEDULE
PRINTDOWN
ADD PROPOSAL
REFER TO UNDERWRITER
UPLOAD DOCUMENTS
EDIT QUOTE

By checking this box you attest to the declaration statement ([click to view a copy](#))

CONFIRM BIND COVER

- ▶ QUOTE SUMMARY shows the cover details
- ▶ Click to attest to the Declaration Statement
- ▶ Click on **CONFIRM BIND COVER**
- ▶ Policy Documents are sent instantly via email



CONVERT TO POLICY SUCCESSFUL

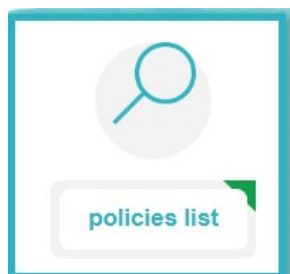
Thank you for binding cover. Please accept this as confirmation of cover with effect 27/05/2025. Your email containing the applicable policy documents has been sent. Please contact Pacific Indemnity underwriting@pacificindemnity.com.au if you do not receive the email.

OK

RESENDING POLICY DOCUMENTS

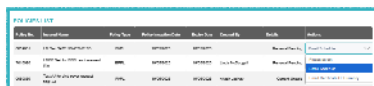
Policies List

Go to Policies List in the Dashboard



Locate Policy

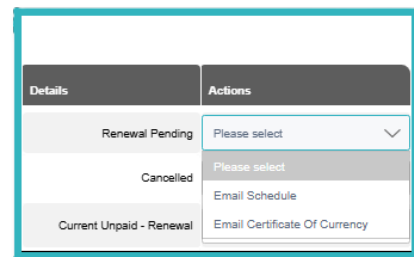
- ▶ Locate the Policy in the POLICIES LIST
- ▶ The option to Email Schedule, or Email Certificate of Currency, is in the Actions column



Policy No.	Renewal Date	Status	Details	Actions
123456	2024-12-31	Active	Policy Details	Renewal Pending
789012	2024-12-31	Cancelled	Policy Details	Cancelled
345678	2024-12-31	Current Unpaid - Renewal	Policy Details	Current Unpaid - Renewal

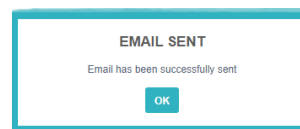
Select The Document

- ▶ Select the document to be emailed



Details	Actions
Renewal Pending	Please select
Cancelled	Please select
Current Unpaid - Renewal	Email Schedule
	Email Certificate Of Currency

- ▶ Enter the email address
- ▶ Confirmation the email has been sent appears in a Pop-up



WHAT SHOULD I DO IF I GET AN ERROR MESSAGE?

On occasion you may receive an error message which may occur for a variety of reasons, including:

- ▶ The system is still saving the previous answer - try to Refresh or Reload
- ▶ A problem with the internet connection

If none of the above reasons apply, please let us know what you were doing at the time, and we will promptly investigate

WHO CAN I CONTACT?

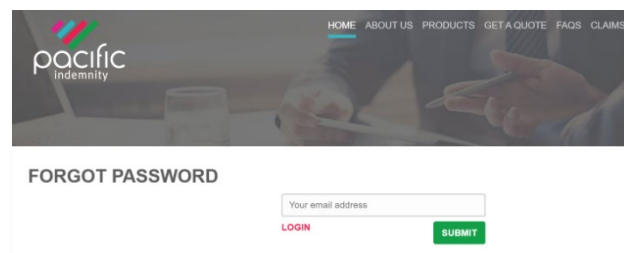
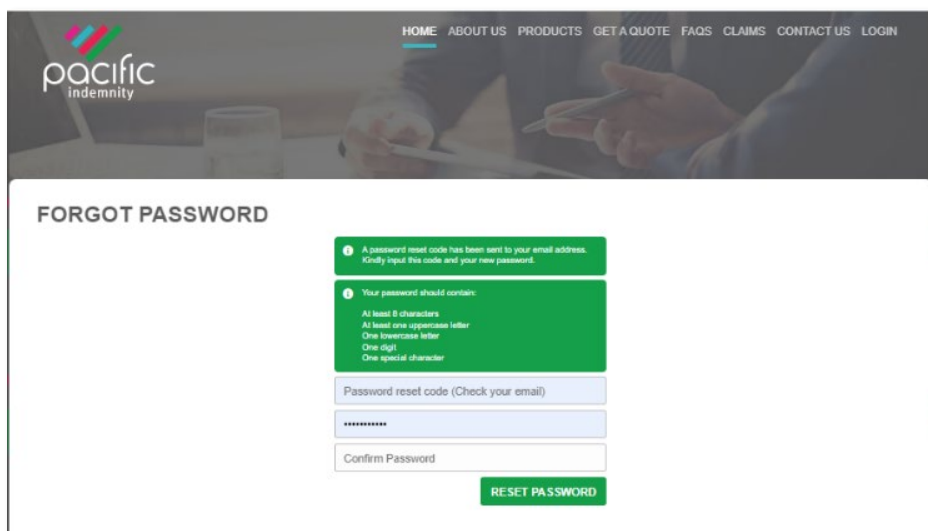
- ▶ To get help filling in the proposal – please phone or email your underwriting contact
- ▶ If you receive an error - please email admin@pacificindemnity.com.au or underwriting@pacificindemnity.com.au and cc your underwriting contact with details of the action you were performing, and any supporting screen shots as these will greatly assist with resolving the problem

Our contact details are:

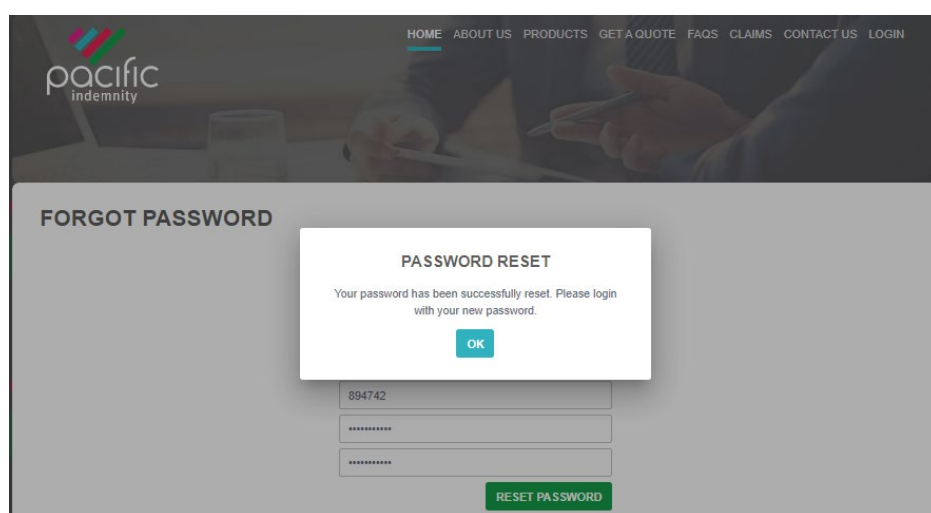
Who	Title	Call	Email
Steven Duckworth	Business Development	0431 796 953	steven.duckworth@pacificindemnity.com.au
Sharmella Perera	Systems & Administration	0478 787 617	sharmella.perera@pacificindemnity.com.au
Veronica Criss	Administration Assistant	0413 057 669	veronica.criss@pacificindemnity.com.au
Melinda Farlow	Senior Underwriter	0418 452 277	melinda.farlow@pacificindemnity.com.au
Oliver Rawnsley	Assistant Underwriter	0411 075 955	oliver.rawnsley@pacificindemnity.com.au
Amanda Fung	Senior Underwriter	0432 226 084	amanda.fung@pacificindemnity.com.au
Simone Oakman	Senior Underwriter	0431 618 869	simone.oakman@pacificindemnity.com.au
Cameron Temby	Senior Underwriter	0411 010 697	cameron.temby@pacificindemnity.com.au
Andrea Skan	Senior Underwriter	0419 237 270	andrea.skan@pacificindemnity.com.au
Rhythm Valera	Senior Liability Underwriter	0421 773 143	rhythm.valera@pacificindemnity.com.au
David Hamilton	Senior Underwriter	0404 801 129	david.hamilton@pacificindemnity.com.au
Jane Aylward	Senior Underwriter	0435 806 755	jane.aylward@pacificindemnity.com.au
Steven Lau	Northern Region Manager	0417 229 520	steven.lau@pacificindemnity.com.au
Edward Rawnsley	Joint - Managing Director	0432 356 554	edward.rawnsley@pacificindemnity.com.au
Greg Hansen	Southern Region Manager	0437 410 810	greg.hansen@pacificindemnity.com.au
Michael Taylor	Senior Liability Underwriter	0401 625 997	michael.taylor@pacificindemnity.com.au
Barry Long	Senior Underwriter	0480 721 384	barry.long@pacificindemnity.com.au

RESETTING YOUR PASSWORD

- ▶ On the Login screen click **FORGOT PASSWORD?**
Enter your email address and click on **SUBMIT**.
- ▶ The screen will progress to the FORGOT PASSWORD screen.

- ▶ You will need to enter the Password Reset Code (please check your emails)
- ▶ Follow the instructions on screen for Setting a New Password and Re-enter the Password and click RESET PASSWORD
- ▶ You will receive a PASSWORD RESET confirmation pop-up.

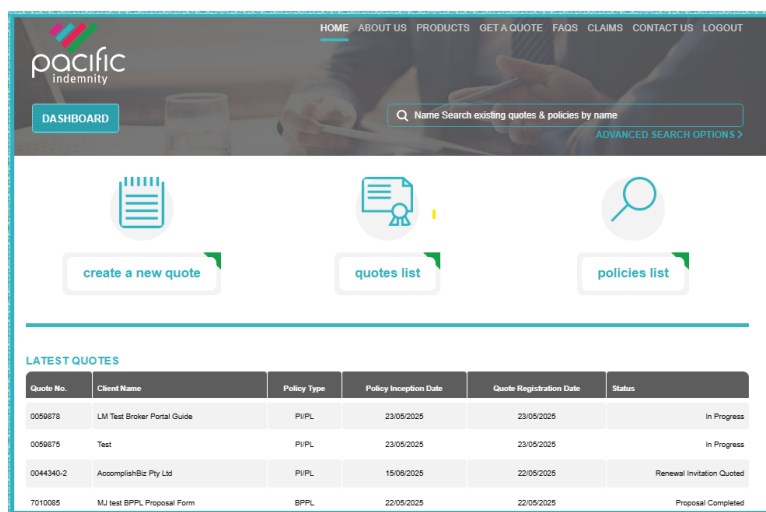


- ▶ Log in with your new password.

DASHBOARD

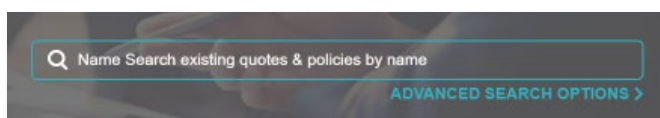
This is the Dashboard. Here you can:

- ✓ Create a new quote
- ✓ Search existing Quotes
- ✓ Search existing Policies
- ✓ See a list of Latest Quotes
- ✓ Click anywhere in the row to Open
- ✓ Name Search OR
- ✓ Advanced Search of quotes and policies



The dashboard shows a navigation bar with links: HOME, ABOUT US, PRODUCTS, GET A QUOTE, FAQS, CLAIMS, CONTACT US, LOGOUT. Below the navigation bar is a search bar with the text "Name Search existing quotes & policies by name" and a link to "ADVANCED SEARCH OPTIONS". The main content area has three large buttons: "create a new quote", "quotes list", and "policies list". Below these buttons is a section titled "LATEST QUOTES" with a table of quotes.

Quote No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status
0059878	LM Test Broker Portal Guide	PIPL	23/05/2025	23/05/2025	In Progress
0059875	Test	PIPL	23/05/2025	23/05/2025	In Progress
0044340-2	AccomplishBiz Pty Ltd	PIPL	15/06/2025	22/05/2025	Renewal Invitation Quoted
7010085	MJ test BPPL Proposal Form	BPPL	22/05/2025	22/05/2025	Proposal Completed



A search bar with the text "Name Search existing quotes & policies by name" and a link to "ADVANCED SEARCH OPTIONS".

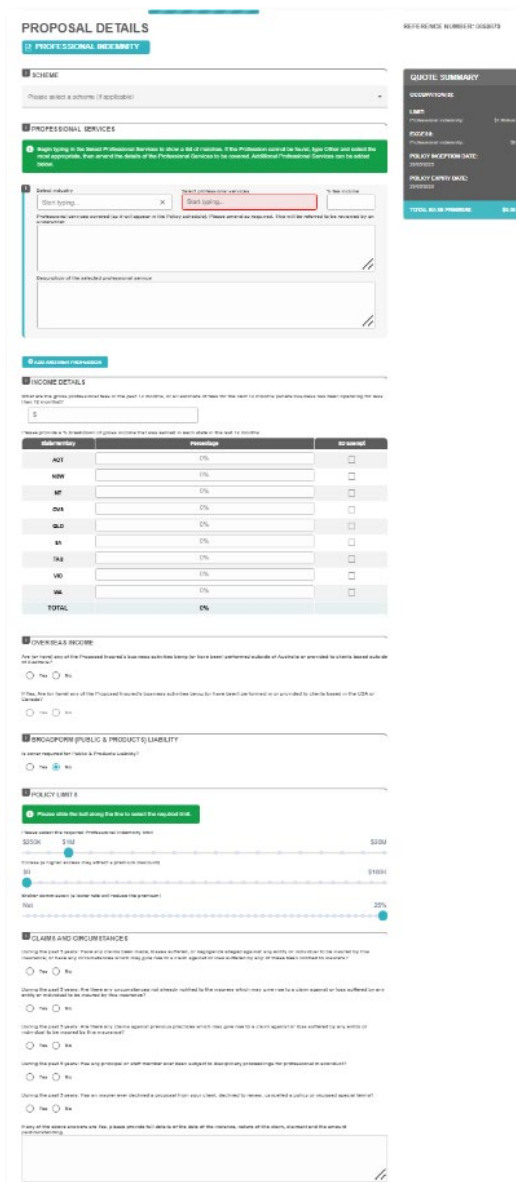
NEW BUSINESS QUOTES

FEATURES:

- ▶ All the proposal information is captured in one screen
- ▶ There are:
 - ✓ 1,700 ANZSIC classified Business Activities listed, of which over 1,300 of these have the potential to auto-rate
 - ✓ Over 470 Professions with more than half of these having the potential to auto-rate
- ▶ Details entered in the proposal are saved every time you move to the next question (therefore no loss of data if you have a break in connection)
- ▶ Selection of Policy Inception and Policy Expiry Dates allow you to request common due dates, etc.



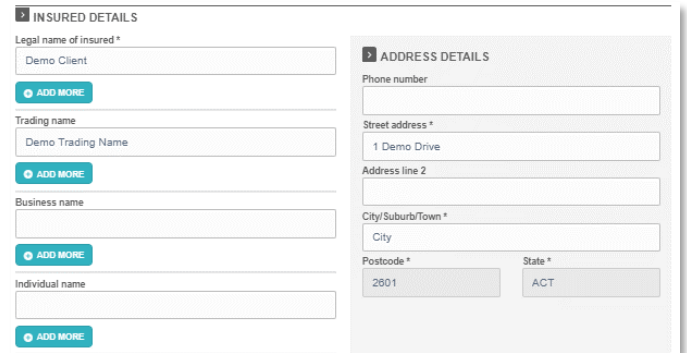
A form for selecting policy dates. It has two main sections: "POLICY INCEPTION DATE" and "Policy expiry date". Under "POLICY INCEPTION DATE", there is a "Policy inception date" field with a calendar icon and a "Preferred policy inception date" field. Under "Policy expiry date", there is a "Policy expiry date" field with a calendar icon.



The "PROPOSAL DETAILS" form is a multi-step process. It starts with a "SCHEME" section where the user selects a scheme. This is followed by a "PROFESSIONAL SERVICES" section where the user selects a profession and a business activity. The next section is "SCHEME DETAILS" where the user enters details about the scheme, including the number of employees and the number of vehicles. This is followed by a "COVERABLE RISK" section where the user selects the types of risks covered. The final section is "POLICY LIMITS" where the user selects the policy limits. The form also includes a "CLAIMS AND CIRCUMSTANCES" section where the user provides details about any claims or circumstances.

CONTACT DETAILS

- ▶ Complete your client's (Insured's) details, including any Trading, Business or additional names
- ▶ Mandatory fields are denoted by an *
- ▶ Begin typing the suburb and select from the list to populate the Postcode and State fields

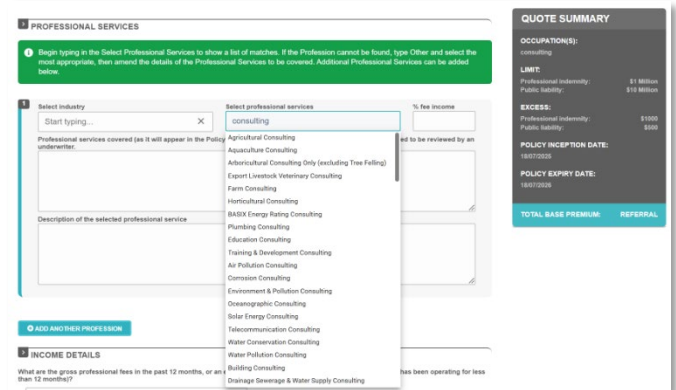


PROFESSIONAL SERVICES and BUSINESS ACTIVITIES

- ▶ Smart Search of all available Professional Services (Professional Indemnity) or Business Activities (Broadform (General) Liability)
- ▶ Start typing the professional services, or business activity, by entering a phrase that searches all words within the Professional, or Industry, description OR select the relevant professional service/s, or business activity/ies from the drop-down list

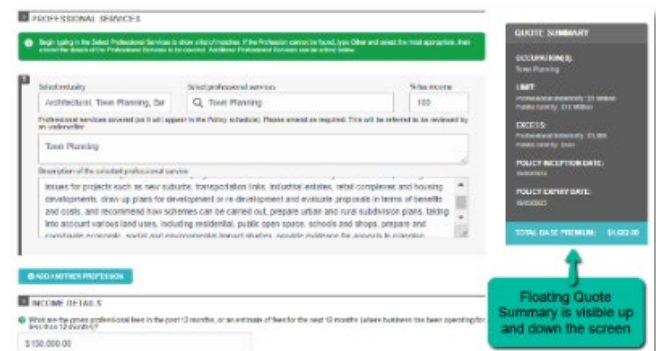
Can't find the Business Activity or Professional Service?

- ▶ Select an Industry, then select "Other...not otherwise listed" from the bottom of the list and provide the additional details in the box below



FLOATING QUOTE SUMMARY

- ▶ Floats' with you on screen as you enter the data
- ▶ Shows the Base Premium as you input the data; OR
- ▶ Shows [Referral](#) immediately if the quote will be required to be referred to an underwriter for review (no Premium will show at this stage)



FEE INCOME BY STATE/TERRITORY

- ▶ Tick if your client is exempt from paying stamp duty and click on [BROWSE](#) to attach the relevant exemption certificate
- ▶ **NSW Small Business Exemption** from Insurance Duty declaration question will appear when relevant.

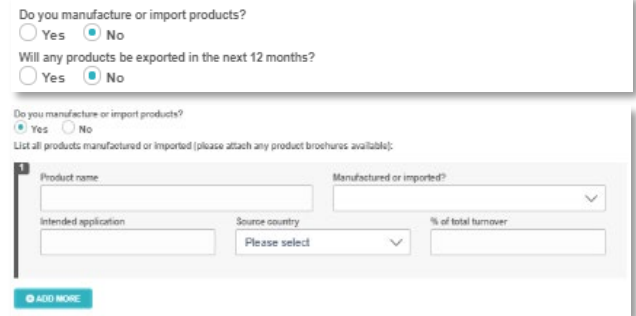
Click on "Yes" if you have received a completed, signed and dated Exemption Declaration. **You do not need to attach the Exemption Declaration.**



DYNAMIC QUESTIONS

Additional tables or questions only appear when relevant to the selected Profession/Industry/Activity selected

Example provided for Manufacture or Import of Products (Broadform Public & Products Liability)



Do you manufacture or import products?
☐ Yes ☒ No

Will any products be exported in the next 12 months?
☐ Yes ☒ No

Do you manufacture or import products?
☒ Yes ☐ No

List all products manufactured or imported (please attach any product brochures available):

Product name	Manufactured or imported?
Intended application	Source country
	Please select
	% of total turnover

[ADD MORE](#)

EXCESS SLIDER

Slide to adjust – located in both the PROPOSAL DETAILS and SUMMARY screens

A higher than standard excess will attract a discount

A lower excess may Refer for approval

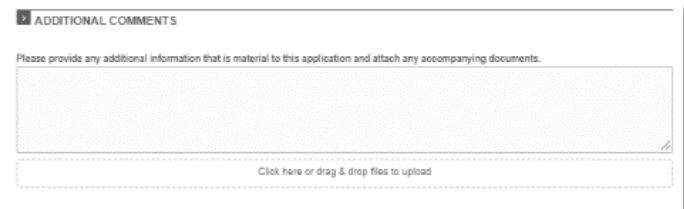


ADDITIONAL COMMENTS & INFORMATION

- ▶ Enter any details that need to be declared and form part of the proposal form information
- ▶ Comments received from your client will appear in this box

Attaching Documents

- ▶ Drag & Drop, or Click to Browse, to upload documents to the proposal.



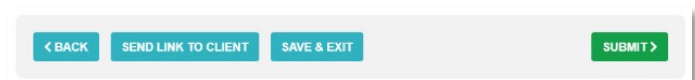
2 ADDITIONAL COMMENTS

Please provide any additional information that is material to this application and attach any accompanying documents.

Click here or drag & drop files to upload

OPTIONS AT END OF PROPOSAL

- ▶ **BACK** to return to the CONTACT DETAILS page
- ▶ **SEND LINK TO CLIENT** (see below)
- ▶ **SAVE & EXIT** - Details are saved to return to at a later time
- ▶ Click [SUBMIT >](#) to proceed to the next page



[< BACK](#) [SEND LINK TO CLIENT](#) [SAVE & EXIT](#) [SUBMIT >](#)

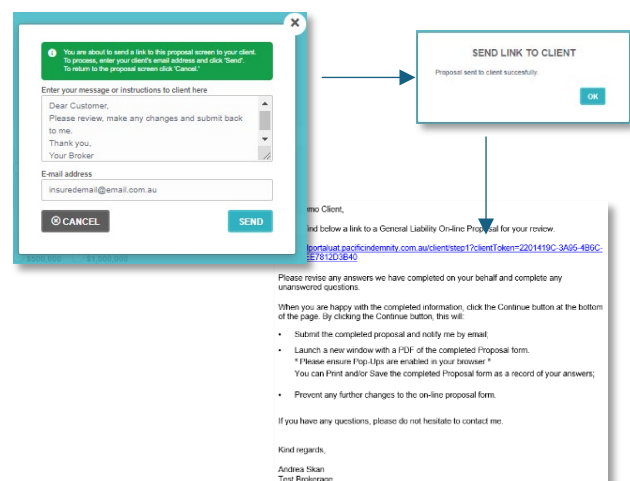
SEND LINK TO CLIENT

SEND LINK TO CLIENT

- ▶ An email will be generated that will contain a link for your client to review and edit the proposal details. You can also enter a personalised message to your client here.
- ▶ The link will be **valid for 10 days**

Your client can:

- ✓ Choose their Preferred Inception Date
- ✓ Amend proposal answers
- ✓ Save/Print a copy of their proposal when completed



SEND LINK TO CLIENT

Proposal sent to client successfully

OK

Dear Customer,
 Please review, make any changes and submit back to me.
 Thank you,
 Your Broker

Email address
 insuredemail@email.com.au

[CANCEL](#) [SEND](#)

Dear Client,
 Find below a link to a General Liability On-line Proposal for your review.
<https://portal.pacificindemnity.com.au/client/step1?clientToken=22014190-3A95-489C-8E7812D3B40>

Please revise any answers we have completed on your behalf and complete any unanswered questions.

When you are happy with the completed information, click the Continue button at the bottom of the page. (By clicking the Continue button, the will:

- Submit the completed proposal and notify me by email.
- Launch a new window with a PDF of the completed Proposal form.
- * Please ensure Pop-Ups are enabled in your browser *
- You can Print and/or Save the completed Proposal form as a record of your answers;
- Prevent any further changes to the on-line proposal form.

If you have any questions, please do not hesitate to contact me.

Kind regards,
 Andreas Skan
 Test Brokerage

- ▶ Your client's answers are **only** submitted to you (not to Pacific Indemnity)
- ▶ Once submitted by your client:
 - ✓ Their answers become Read Only
 - ✓ You will be notified via email
 - ✓ You can review and modify before submitting to Pacific Indemnity
- ▶ You can see the status of your client's proposal at any stage:

Your client has not reviewed or returned the proposal to you:

SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0051261	Test [REDACTED]	PIPL	20/06/2025	20/06/2025	Proposal Sent	

Your client has reviewed and returned the proposal to you. You will receive an email to notify you of this:

SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0051457	LM Test for auto quote	PIPL	17/07/2025	17/07/2025	Proposal Completed	

RETRIEVE PROPOSAL

- ▶ If you need to withdraw from sending the proposal link to your client, you can click on **RETRIEVE QUOTE** in the **SUMMARY** screen. This will allow you to edit the proposal details.

RETRIEVE QUOTE

EXIT

WHAT YOUR CLIENT SEES

The message entered in the **SEND LINK TO CLIENT** window shows at the top of the email with your client's link

- ▶ Your client can elect a Preferred Policy Inception Date
- ▶ The Proposal questions mimic those you see in the PROPOSAL DETAILS screen, **excluding** the Broker Commission slider and the floating Quote Summary
- ▶ Your client can provide further information in the ADDITIONAL COMMENTS box
- ▶ When **SUBMIT** is clicked:
 - ✓ A confirmation message appears
 - ✓ The answers become Read Only
 - ✓ A new window launches with a PDF file your client can Save or Print
 - ✓ You will be notified via email
 - ✓ You can review and modify before submitting to Pacific Indemnity

Please find below a [link](#) to an On-line Proposal for your review.

<https://pacindportaluat.pacificindemnity.com.au/client/4EE47515-3480-4FF3-A9FA-6E06E5D48892>

Please review any answers we have completed on your behalf, and complete the unanswered questions.

When you are happy with the completed information, click the Ok button at the bottom of the page. Clicking the Ok button will:

- Launch a new window with a PDF of the completed Proposal form. Print and/or Save the completed Proposal form as a record of your answers;
- Not allow any further changes to the proposal form.

If you have any questions, please do not hesitate to contact me.

POLICY INCEPTION DATE

Policy inception date*	Preferred policy inception date	Policy expiry date
22-05-2025		22-05-2025

ADDITIONAL COMMENTS

Please provide any additional information that is material to this application and attach any accompanying documents. Please note that any comments and/or documents provided will form part of the proposal form.

Click here or drag & drop files to upload

CONFIRM

You are about to Submit the proposal form. To proceed, click 'Continue' and a new window (tab) will open with a PDF copy of your answers, from which you will be able to Save and/or Print a copy for your records. To return to the proposal screen, click 'Cancel'.

CANCEL OK

Your client, MU test PIPL PF, has completed their review of the Portal proposal answers and submitted it back to you.

You can access the Portal proposal by clicking the below link
<https://pacindportaluat.pacificindemnity.com.au/su/step1/0059873>

Next steps:

- Click 'Next' to submit the proposal and view your terms.
- If it is a Referral, please Click 'Next' and complete the Referral Details screen. You will receive your terms within 24 hours of the next business day.

Thank you,

SUMMARY SCREEN

This screen summarises your quote in an easy-to-read page.

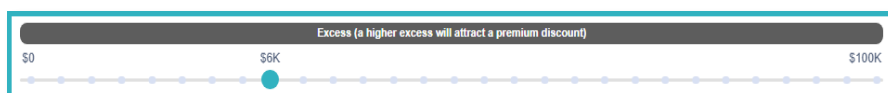
From here you can:

- ▶ Review all the answers provided in the PROPOSAL DETAILS screen
- ▶ Review REFERRAL REASONS (where applicable)
- ▶ Select the Limit option you require (including for Broadform Liability, if included with Professional Indemnity)

- ▶ Enter a Broker Fee *(inclusive of GST) to appear in your quote

**Not included as part of the Net Premium Payable as this is not collected by Pacific Indemnity.*

- ▶ Select alternate Excess (by using the slider) and see the premium update



- ▶ View the Applicable Endorsements and/or Special Terms & Conditions if applied

- ▶ [← EDIT QUOTE](#) to return to the CONTACT DETAILS screen to edit the details if required

- ▶ [EMAIL SUMMARY](#) is used to email a Quote summary to a nominated email address

EMAIL SUMMARY

1 Please enter the recipient's email address and click submit.

Email address

ⓧ CANCEL

SEND

- ▶ [PRINT/DOWNLOAD PROPOSAL](#) will launch a new window with a PDF record of the portal Proposal answers. **Please allow pop-ups for this website.**

- ▶ [NEXT >](#) proceeds to the next screen for a formal quote and the ability to BIND Cover.

SUMMARY

2 PROFESSIONAL INDEMNITY

REFERENCE NUMBER: 0051489
STATUS: QUOTE COMPLETE

1 Please carefully review all the below details. By proceeding to the next step, you are confirming the information is true and correct. To amend, click EDIT QUOTE.

PERIOD OF COVER

INSURED DETAILS

PROFESSIONAL SERVICES

3 PREMIUM SUMMARY ALL SECTIONS

	Professional Indemnity Premium	Broadform Premium	Total Premium
Premium	\$766.00	\$245.00	\$1,011.00
GST	\$76.60	\$24.50	\$101.10
Stamp duty	\$14.85	\$6.83	\$21.68
Policy fee (incl.GST)	\$65.00	\$0.00	\$65.00
Enter Broker Fee inclusive of GST	110	-	\$110.00
Total premium payable	\$1,004.85	\$496.33	\$1,501.18
Broker commission (20%)	\$180.00	\$99.00	\$279.00
Broker commission GST	\$18.00	\$6.90	\$24.90
Net premium payable	\$729.85	\$391.43	\$1,121.28

PROFESSIONAL INDEMNITY ALTERNATIVE LIMIT

Click to select limit

Professional Indemnity Limit	\$1,000,000.00	\$2,000,000.00	\$5,000,000.00	\$10,000,000.00	\$20,000,000.00
Premium	\$2,122.00	\$2,879.00	\$3,617.00	\$4,386.00	\$5,722.00
GST	\$212.20	\$287.90	\$361.70	\$438.60	\$572.20
Stamp duty	\$216.86	\$284.63	\$361.77	\$439.50	\$578.83
Policy fee (incl.GST)	\$165.00	\$165.00	\$165.00	\$165.00	\$165.00
Total premium payable	\$2,806.92	\$3,696.53	\$4,728.47	\$5,729.10	\$7,038.83
Broker commission (20%)	\$561.38	\$739.31	\$945.70	\$1,145.82	\$1,407.77
Broker commission GST	\$56.14	\$73.93	\$94.57	\$114.58	\$140.78
Net premium payable	\$2,245.54	\$2,967.22	\$3,788.77	\$4,583.28	\$5,631.06

PROFESSIONAL INDEMNITY COVER DETAILS

Professional Services Covered Management Consulting

Excess (a higher excess will attract a premium discount)

\$0 \$10K \$100K

APPLICABLE ENDORSEMENTS

Title

MANAGEMENT CONSULTING - SPECIAL EXCLUSIONS

Working deal

View working

SPECIAL TERMS AND CONDITIONS

Title

Working deal

BROADFORM LIABILITY ALTERNATIVE LIMIT

Click to select limit

Broadform Liability Limit (Public/Products/Advertising Limit)	\$2,000,000.00	\$10,000,000.00	\$20,000,000.00
Premium	\$225.00	\$415.00	\$508.00
GST	\$22.50	\$41.50	\$50.80
Stamp duty	\$21.43	\$38.45	\$47.00
Policy fee (incl.GST)	\$0.00	\$0.00	\$0.00
Total premium payable	\$248.93	\$494.95	\$605.80
Broker commission (20%)	\$49.79	\$98.99	\$121.16
Broker commission GST	\$4.98	\$9.90	\$12.12
Net premium payable	\$194.16	\$385.96	\$472.52

BROADFORM LIABILITY COVER DETAILS

Business Activities Covered Management Consulting

Excess \$200.00

APPLICABLE ENDORSEMENTS

Title

Working deal

SPECIAL TERMS AND CONDITIONS

Title

Working deal

ELI RISKS & CIRCUMSTANCES

ADDITIONAL COMMENTS

← EDIT QUOTE

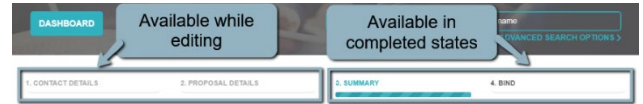
EMAIL SUMMARY

PRINT/DOWNLOAD PROPOSAL

NEXT >

NAVIGATION AT THE TOP OF THE PAGE

Once the proposal details are completed and a quote is available, the screen headers can be used to navigate between the pages.



PRINT/DOWNLOAD PROPOSAL

This is a record of the answers entered in the Portal Proposal Details screen that can be printed and/or saved.

This includes a declaration statement for you to gain your client's sign-off on the information provided

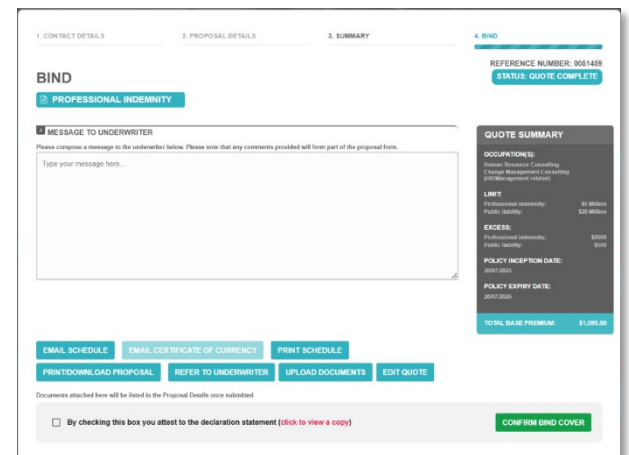
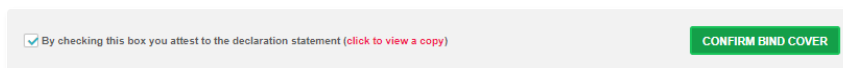
*You are **not** required to send this completed form to Pacific Indemnity*



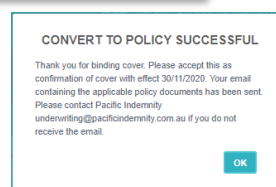
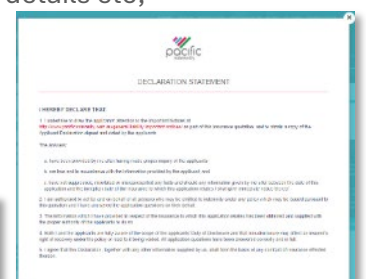
BIND COVER

Options on this screen:

- ▶ Type a message to the underwriter for review;
- ▶ **EMAIL SCHEDULE** to Email the quote to a nominated email address;
- ▶ **PRINT SCHEDULE** to launch the quote schedule in a new window to Print or Save the quote to your files;
- ▶ **PRINT/DOWNLOAD PROPOSAL** to launch a new window with a PDF record of the portal Proposal answers (see the Print/Download Proposal section above);
- ▶ **UPLOAD DOCUMENTS** to attach any supporting documents, e.g. CV/Resume, Company Profile, Contract Details, Existing Insurer's schedule, Completed Proposal form, etc;
- ▶ **REFER TO UNDERWRITER** to Refer the risk to an Underwriter to review. Reasons may be:
 - the automatically generated terms are not competitive or require amending
 - additional information has been supplied e.g. company profile, contract details etc;
- ▶ **CONFIRM BIND COVER** button becomes active when you have read and ticked the box to confirm you agree to the **Declaration Statement**.

A confirmation window pops-up to confirm the cover is bound and an email containing the applicable policy documents will be sent to your email address.

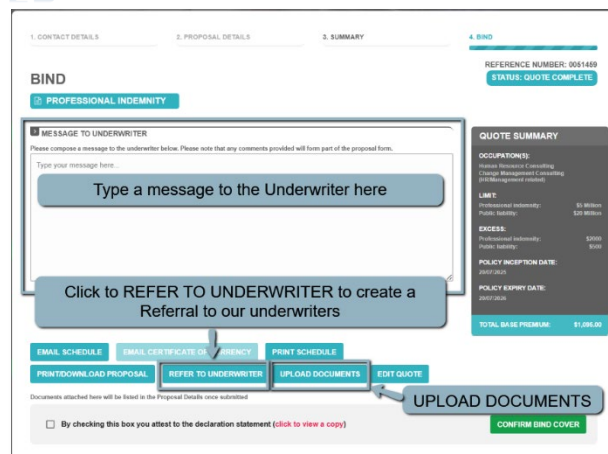



REFER TO OR MESSAGE THE UNDERWRITER

In the **BIND** screen you can elect to Refer your quote to an underwriter to review the automatically generated terms.

Reasons you may choose to Refer or Message:

- ▶ Enter a **MESSAGE TO UNDERWRITER** in the box provided with the message or information you would like the Underwriter to take into consideration when assessing the risk
- ▶ You may have additional information that you wish to attach to the submission via **UPLOAD DOCUMENTS** (ex. a company profile, contract details etc)



REFERRED QUOTES

When a quote requires referral to an underwriter, the following **REFER TO AN UNDERWRITER** screen will display:

- Reasons for referral are displayed in the Referral pop-up and subsequently on the SUMMARY screen

Other options available from this screen:

- ▶ **EDIT QUOTE** to return to the previous screen and edit the proposal information
- ▶ **Click or drag & drop files to upload** to assist with assessment of the risk

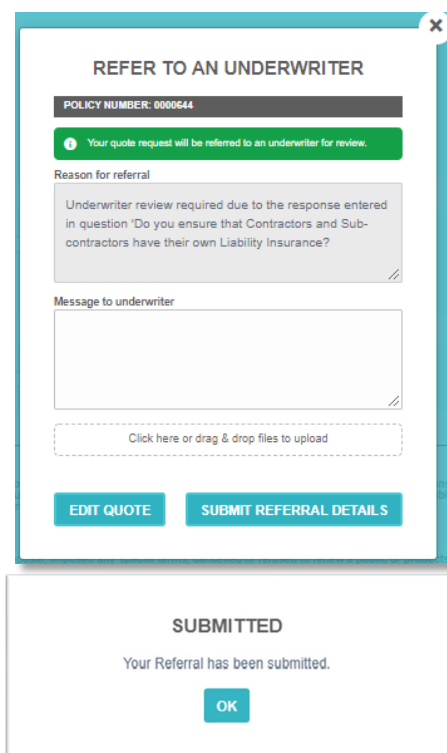
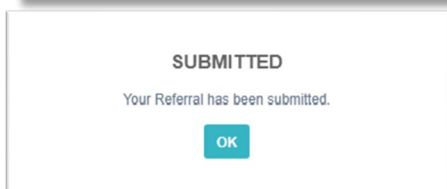
(for example: Company Profile, claim/circumstance details, Risk Management procedures, completed proposal form, expiring schedule/details etc)

- ▶ Enter a **Message to Underwriter**, to provide any further information you feel could assist with assessment
- ▶ Click **SUBMIT REFERRAL DETAILS** to submit the Referral for review

You will receive confirmation that your Referral has been successfully submitted.

An underwriter will assess and provide a response within 24 hours, on the next business day.

Your submission will have a '**Referred**' status in the Dashboard:

SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0051454-1		PI/PL	16/07/2026	16/07/2025	Renewal Referred	
7008211		BPPL	15/07/2025	15/07/2025	Referred	

APPROVED QUOTES

In the DASHBOARD, when a Referred quote has been Approved it will appear with a status of **Approved** or **Renewal Approved** for renewals

- Click anywhere in the row to open to the **CONTACT DETAILS** page, proceed through the PROPOSAL DETAILS which is editable to make any further changes, then SUBMIT to continue to the SUMMARY page

SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
7000206-6	Andrea Lifestyle Grand Pty Ltd As trustee for t...	BPPL	31/07/2025	09/07/2025	Renewal Referral Approved	
7008180	MJ test BPPL Claim Comm	BPPL	07/07/2025	07/07/2025	Approved	

These may also be released as Quoted and will appear with a status of **Quoted** or **Renewal Quoted** for renewals. You can also use the Advanced Search to search for Quote Complete or Renewal Quoted. The underwriter may also issue the quote to you via email.

- Click anywhere in the row to open to the **SUMMARY** page

LATEST QUOTES

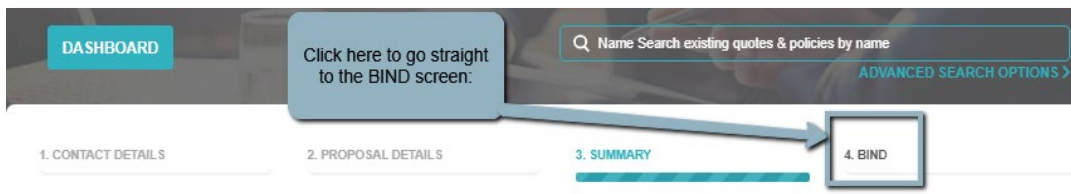
Quote No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
7008219		BPPL	18/07/2025	18/07/2025	Quoted	

SEARCH RESULTS

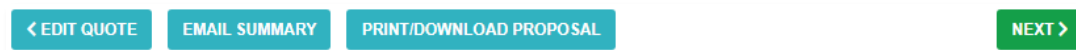
Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
7008219		BPPL	18/07/2025	18/07/2025	Quote Complete	

From the **SUMMARY** you have 5 options:

- Click BIND at the top of the page to take you directly to the BIND screen:



Scroll to the bottom of the page and click one of the following:



RENEWAL QUOTES

Renewal quotes can be viewed and transacted on the Portal (subject to qualifying criteria)

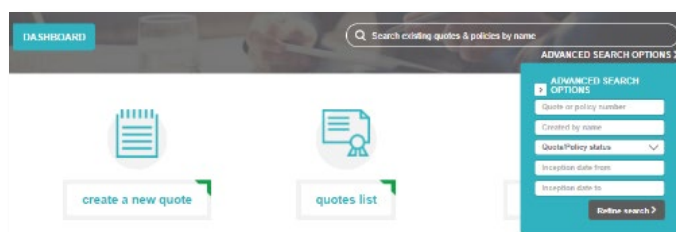
When a Renewal Invitation has been released accompanied with the Renewal quotation terms, the quote can be viewed and bound on the Portal. Search for Renewal Invitation Quoted via **ADVANCED SEARCH OPTIONS**.

SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0001960-7		PI/PL	30/08/2025	17/05/2025	Renewal Invitation Quoted	

Locating Your Renewals

- ▶ In the DASHBOARD, use the Name Search bar at the top, or
- ▶ Click **ADVANCED SEARCH OPTIONS**
- ▶ Type the Policy Number OR make a selection in the Quote/Policy status option:



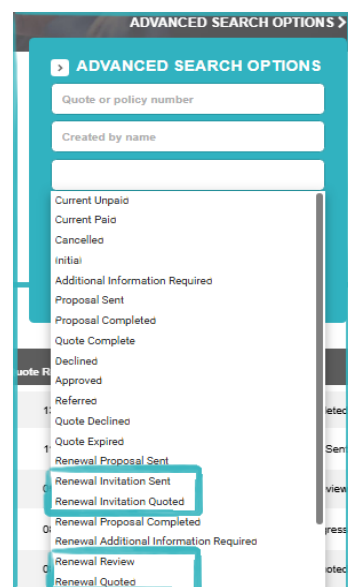
Select from:

- ✓ Renewal Invitation Sent (Invitation has been issued but not Auto Quoted)
- ✓ Renewal Review (Underwriter is reviewing)
- ✓ Renewal Quoted or Renewal Invitation Quoted (Renewal has been quoted)

- ▶ ENTER or click **Refine search** to see the Search Results

Example for Renewals Quoted:

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
7010080-1	LMPE Test for BPPL endorsement title	BPPL	19/05/2025	19/05/2025	Renewal Quoted	
0059824-1	MJ test WF status	PI/PL	09/05/2025	09/05/2025	Renewal Quoted	
7010078-1	MJ testing BPPL ext	BPPL	07/05/2025	07/05/2025	Renewal Quoted	

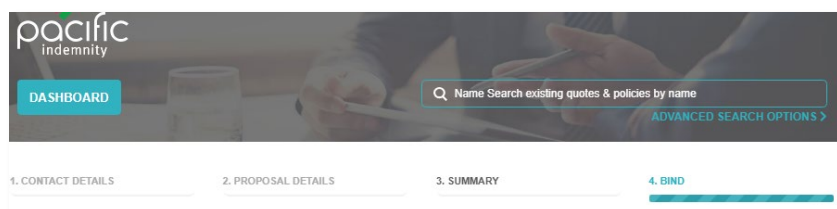


SHORTCUT TO BIND SCREEN

For completed Quotes and/or Renewal Quotes

To quickly move to the **BIND** screen for completed Quotes and/or Renewal Quotes :

- ▶ Click anywhere in the row to open the SUMMARY page from the Search Results
- ▶ Click **4. BIND** link in the list across the top of the page



HOW TO SEARCH

NAME SEARCH - Use the Search bar at the top to search by name

- ▶ Enter the name and the search begins instantly
- ▶ The search results are shown below

ADVANCED SEARCH OPTIONS >

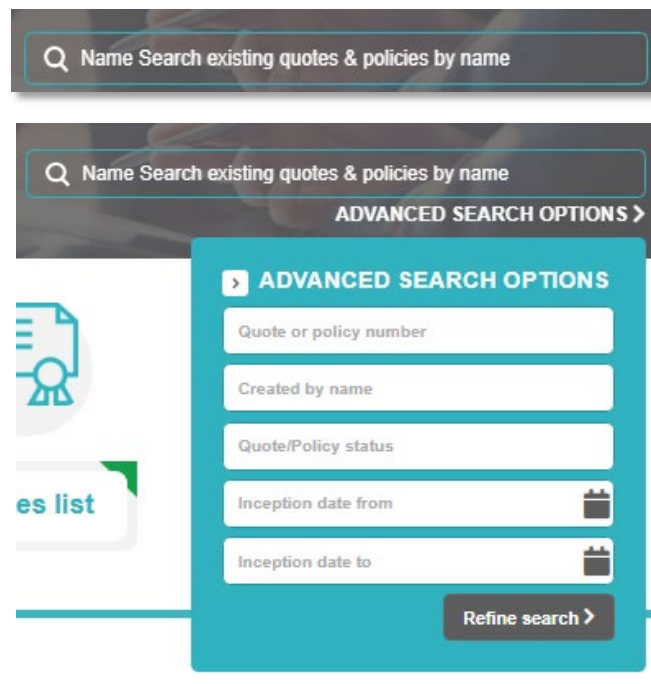
Click **ADVANCED SEARCH OPTIONS >** to search by:

- ▶ **Quote or policy number** (enter an * before and after the policy number to search any policy period e.g. to search policy 0000311, enter *311*)
- ▶ **Created by name** = the person who created the quote
- ▶ **Quote/Policy status**
- ▶ **Inception date from**
- ▶ **Inception date to**

Press ENTER or Click **Refine search >**

Click on any column or row to open the proposal pages

Return to **DASHBOARD** to clear the Search

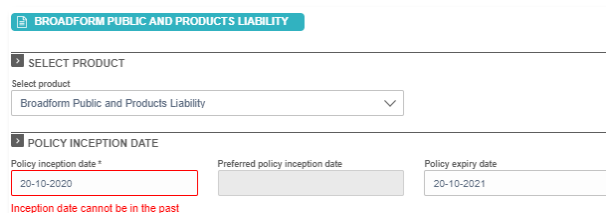


The screenshot shows the 'Name Search existing quotes & policies by name' bar at the top. Below it, the 'ADVANCED SEARCH OPTIONS >' section is expanded, showing input fields for: Quote or policy number, Created by name, Quote/Policy status, Inception date from (with a calendar icon), and Inception date to (with a calendar icon). A 'Refine search >' button is at the bottom right of the advanced options panel.

EXPIRED QUOTES

If a quote has expired (including a renewal quote that is past the inception date of the new policy period) and you want to make it an active quote again:

- ▶ Open the expired quote or renewal quote:
Scroll to the bottom of the Summary page and click on **< EDIT QUOTE**
- ▶ You will be required to adjust the Inception date to a valid date > or = 30 days from today's date
- ▶ **By clicking the **NEXT >** button, at the bottom of the Contact Details page, you are confirming the details are true and correct and this will create a valid quote for binding**
- ▶ Review the proposal information (if required) and click **SUBMIT >** to get an updated Binding Quote

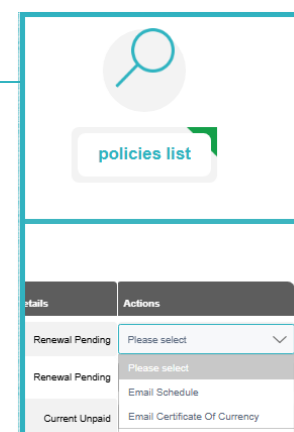


The screenshot shows the 'BROADFORM PUBLIC AND PRODUCTS LIABILITY' form. It has a 'SELECT PRODUCT' section with a dropdown menu set to 'Broadform Public and Products Liability'. Below that is the 'POLICY INCEPTION DATE' section, which includes a 'Policy inception date *' field (set to 20-10-2020), a 'Preferred policy inception date' field, and a 'Policy expiry date' field (set to 20-10-2021). A red error message 'Inception date cannot be in the past' is visible below the policy inception date field.

RESENDING POLICY DOCUMENTS

- ▶ Go to **policies list**, OR
- ▶ Use the **ADVANCED SEARCH OPTION** to find the required policy:
- ▶ Accessing policies via this list allows you to email the policy Schedule and/or Certificate of Currency to the nominated email address:

In the Actions column, select from the drop down



The screenshot shows the 'policies list' interface. It features a search icon and a 'policies list' button. Below this is a table with two columns: 'Status' and 'Actions'. The 'Status' column has three rows: 'Renewal Pending', 'Renewal Pending', and 'Current Unpaid'. The 'Actions' column has three rows, each with a dropdown menu. The first two dropdowns are set to 'Please select', and the third is set to 'Email Certificate Of Currency'.