

CLIENT ASSISTED JOURNEY EMAIL TEMPLATE FOR BROKERS

Positioning AIA Financial Wellbeing in your client communications

The following wording is approved by AIA to be included in emails to clients to introduce the AIA Financial Wellbeing offering. You may like to attach a copy of (or link to) the [AIA Client Flyer](#).

At <Business Name>, our primary role is to help provide you the funding you need to make your dreams a reality. We know how hard you have worked to get into this position, and we want to make sure we have also done our best to help you protect yourself and your family should the unexpected happen.

It can be hard to talk about, but have you thought about what would happen with your mortgage and other expenses, if you were suddenly unable to earn an income due to serious illness or injury?

To help protect our clients, we have partnered with the friendly team at AIA Financial Wellbeing who can provide advice on AIA life insurance and income protection. They can explain the options, provide a quote and help you apply.

Some of the services they offer include:

- Life / Income Protection / Trauma / Total & Permanent Disability Insurance
- Health Insurance
- Personalised Financial Advice (*broker delete if not required*)

Through this partnership, <Business Name> arranges for its clients to receive a complimentary, obligation-free initial phone consultation and quote with AIA, to make sure you and your family are protected should anything unexpected happen.

Please nominate when you would like to discuss your options with the AIA Financial Wellbeing team:

1. Now
2. When my loan is formally approved
3. Once my loan has settled
4. None of the above

Please indicate which insurance option you are interested in discussing with the AIA Financial Wellbeing team.

1. Life / Income Protection / Trauma / Total & Permanent Disability Insurance
2. Health Insurance
3. Both
4. I am happy with my current level of insurance

If you agree to being contacted by AIA Financial Wellbeing (AIAFW) to discuss your protection needs, you may also be offered or invited to apply for life and health insurance.

AIAFW will also share the outcome of your referral with Yellow Brick Road (including whether you have obtained a financial product or financial advice) and pay a referral fee where you have obtained life insurance, health insurance and/or financial advice.

Your details are used in accordance with the AIA Australia Group's Privacy Policy available at aia.com.au.

If you have any questions or concerns, please let us know.