

## The RBC Insurance Business Intelligence Centre is ready when you are

Getting connected is easy. All you need is a user account. To get yours, visit the Sales Resource Centre ([www.rbcinsurance.com/getconnected](http://www.rbcinsurance.com/getconnected)), or call your regional office at 1-866-235-4332. Then, we'll send you a temporary password that gives you immediate access to the site.

**Are you already using the RBC Insurance Business Intelligence Centre?** We've upgraded the site so you can better manage your business. Take a look at the new sales tools and features during your next visit.

RBC Insurance Business Intelligence Centre

[www.rbcinsurance.com/getconnected](http://www.rbcinsurance.com/getconnected)

Get connected



RBC Life Insurance Company

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RBC Insurance Business Intelligence Centre

Get connected



The RBC Insurance Business Intelligence Centre gives you round-the-clock access to the information and tools you need to serve your clients and build your business.

[www.rbcinsurance.com/getconnected](http://www.rbcinsurance.com/getconnected)





# The advantage is yours

With 24/7 access, user-friendly search capabilities, and effective sales tools, the RBC Insurance® Business Intelligence Centre makes it easy to manage your business better. Here’s what you’ll get when you sign on:

- **Access when it’s convenient for you.** The secure, password-protected web site is available to you 24 hours a day, seven days a week.
- **Tools to manage pending business.** Generate reports to help you manage new policies and identify outstanding requirements (underwriting and settling).
- **Sales tools to help build your business.** Get detailed client information and listings, plus reports on clients with upcoming policy renewals, expiries, or conversions.

[www.rbcinsurance.com/getconnected](http://www.rbcinsurance.com/getconnected)

### VIEW POLICY DETAILS

View detailed policy information, including policy status, coverage amounts, billing schedule and amounts, relationships such as insured, beneficiary, policyowner, servicing representative – and more!

Policy Inquiry

Print

Policy Number: 123456

Report Highlights

Updated: [Waiver Premium - 1278](#)  
[TermLife 10 Year Renewable and Convertible Term for Amount](#)  
[Renew Level 2.1 \\$10,000 to \\$25,000 1 - 1982](#)

NA

Owner Information

Name: AGAM SMITH

Date of Birth: 07 Feb 1971

Smoker Status: Non-Smoker

Gender: Male

Language: English

Default mailing address:

### GENERATE A CLIENT LIST

The client listing report is one of several great sales tools that lists your clients by product and/or status, and allows you to print labels directly from the report.

Sales Tools

Client Listing

Print

Rep code: 123456

Client list page is protected using labels formatted to standard Agency labels (0/100)

Page 1 of 96

1 2 3 4 5 6 7 8 9 10-15 20-25 30-35

Policy Owner DOB Address Tel # Product Policy Type Status

56555 06/06/1972 23 Mar 1973 100 SIMPSON ST THUNDER BAY, ON, Canada M5H 1A5 Term 100 (with Values) 09887366 Inforce

7079707 06/06/1972 14 Sep 1987 400-111TH AVE THUNDER BAY, ON, Canada M5H 1A5 Renewable Term 10 52556846 Inforce

### REMEMBER KEY DATES WITH THE RENEWAL/EXPIRY/CONVERSION REPORT

This useful sales tool generates a listing of policies due for expiry, conversion, or renewal within the next six months, and lets you print labels directly from the report.

Sales Tools

Renewal/Expiry/Conversion

Print

Rep code: 23456

Client list page is protected using labels formatted to standard Agency labels (0/100)

Page 1 of 5

1 2 3 4 5

Policy Number XXX022135544

Owner Information

Name: AGAM SMITH

Address: PO BOX 1334 Thunder Bay, ON, Canada M5H 1A5

Tel # 880-123-4567

Coverage Information

Insured DOB Product Face Amount Renewal Date Expiry Date Conversion Date

July Smith 29 Jun 1968 Term 20 \$ 50,000.00 "N/A" 21 May 2006 21 May 2006

### IDENTIFY OUTSTANDING REQUIREMENTS

The outstanding requirements report provides a listing of all outstanding underwriting and settling requirements, and can be run by all outstanding requirements or by requirements changed since a specific date.

Representative Look Up

Print

Representative Details

Representative Name: John Doe

Payment Status: PAY

Representative Number: 123456

Status: ACTIVE

Routing Path: XXXXXXXX

Contract Dates: 20 Feb 2006

Date Terminated:

Representative Reports

Outstanding Requirements

Detailed listing of clients with outstanding requirements

New Business (set up in the last 15 days)

Received Life Insured Plan Type Policy # Representative #

22 Dec 2006 James Lee Term 100 09887366 094321

### MAKE A FRANCHISE INQUIRY

This feature allows you to search for Guarantee Standard Issue® (GSI) cases by name or number, and shows all participating policies as well as details of each participating policy.

Policy Inquiry

Print

Policy Number: 123456

Report Highlights

Updated: [Waiver Premium - 1278](#)  
[TermLife 10 Year Renewable and Convertible](#)  
[Renew Level 2.1 \\$10,000 to \\$25,000 1 - 1982](#)

NA

Owner Information

Name: AGAM SMITH

Date of Birth: 07 Feb 1971

Smoker Status: Non-Smoker

Gender: Male

Language: English

Default mailing address:

### TRACK NEW BUSINESS OPPORTUNITIES

The new business report provides a quick, at-a-glance listing of all new policies set up within the previous 15 days.

Reports

New Business

Print

New Business (set up in the last 15 days)

Received Life Insured Plan Type Policy # Representative #

23 Dec 2006 E. J. Smith Term 10 Renewable and Convertible 11223344 09887366

21 Dec 2006 J. Doe Death 12345678 09887366

21 Dec 2006 John Doe Death 98765432 09887366