**Go above and beyond for your client.**

Tools you can customise by OnePath Life Insurance

**CATEGORY – Getting started, the value of advice**

**EMAIL**

***Tip*: Adding value**

* Include links to relevant articles, which you can house on your website.
* Speak to your BDM to learn how to make better use of this content.

**CATEGORY EMAIL**

Subject:

**How to get started with life insurance**

Email:

Hi [Name],

It was nice meeting/talking with you today/recently.

It’s great that you’re thinking about getting life insurance. I firmly believe it’s something every responsible adult should have. But I also appreciate there’s a lot to take in.

To help you get started, I wanted to share a few articles that explain some of the key things you need to know about life insurance and the financial advice process.

If you have any questions about anything you read, or you’d to talk more about your cover needs, please call me anytime.

Regards,

[Adviser]

This email is being sent as you have opted in to communications from our organisation.

**Further reading for [Client Name]**

*[Choose the most relevant articles from the list below]*

**Planning for your first meeting with a financial adviser**

Walk confidently into your first meeting by getting a better idea of how the financial advice process works.

Read the article <link to article on your website or onepathclarity.com.au>

**6 questions to ask a financial adviser**

If you want a clear picture of the life insurance you’re buying, here’s what you should be asking your financial adviser.

Read the article <link to article on your website or onepathclarity.com.au>

**Myths about life insurance**

It’s time to separate fact from fiction as we dispel some common myths about life insurance.

Read the article <link to article on your website or onepathclarity.com.au>

**Your duty of disclosure (and why it matters)**

Perform your duty of disclosure correctly, and you can be confident your cover will do exactly what you expect it to at claim time.

Read the article <link to article on your website or onepathclarity.com.au>

**The insider’s advantage**

‘Guaranteed renewability’ is the biggest advantage every policyholder should know. Here’s what it means for you.

Read the article <link to article on your website or onepathclarity.com.au>