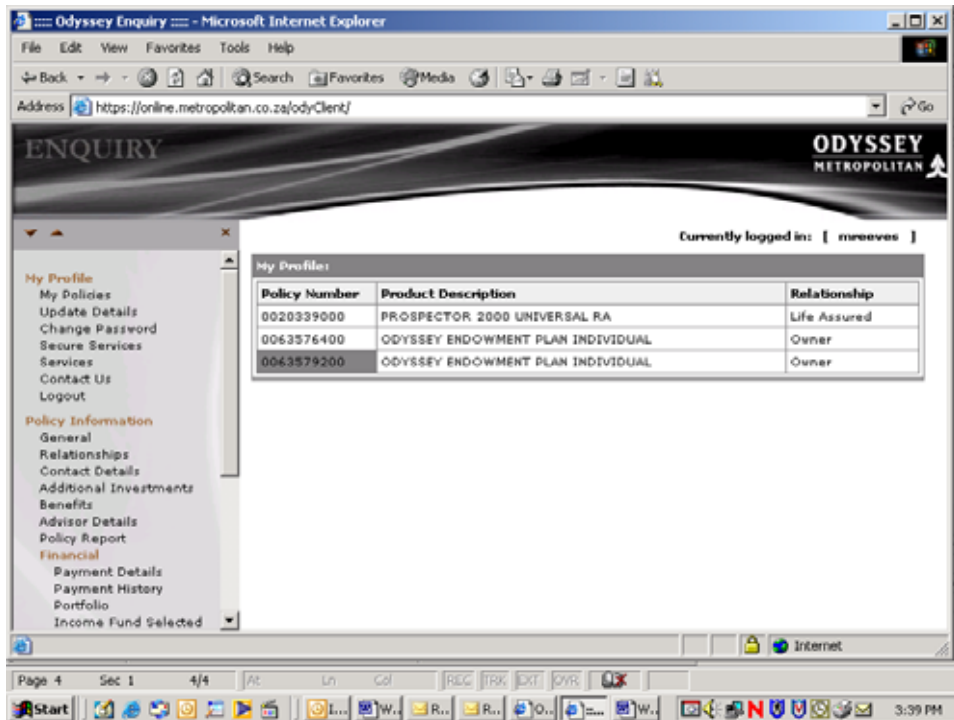


What's available online

Odyssey Customer screens

My Profile

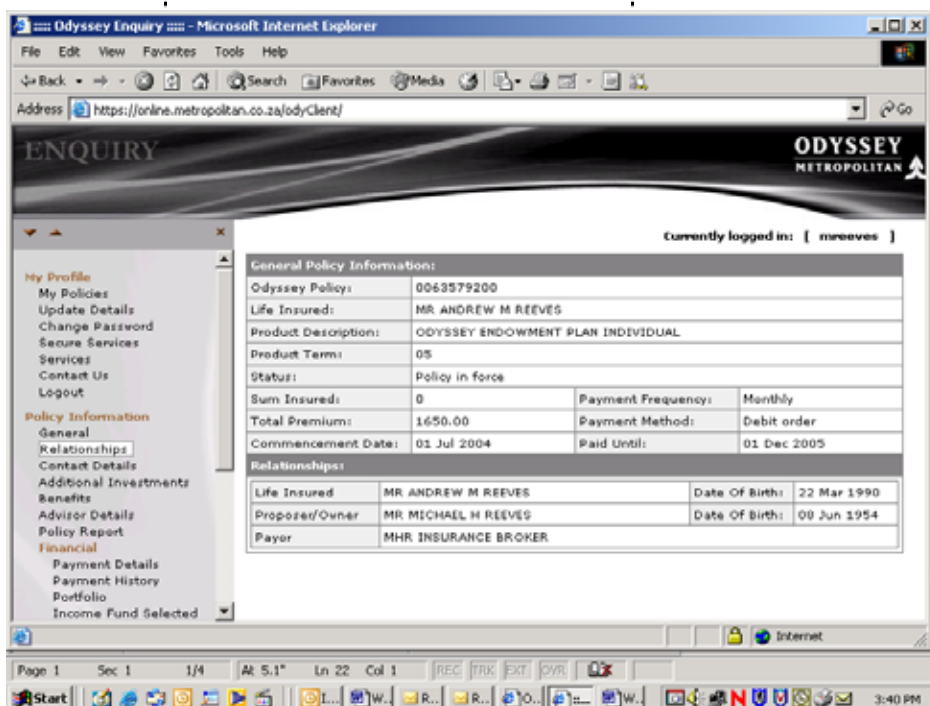
MY PROFILE	FUNCTION	ADDITIONAL NOTES
My Policies	This screen shows a list of the policies owned by the Customer currently logged onto the system.	Common problem: REMEMBER to click on the policy number that you want to view.
Update Details	Update contact details online including User Details and Contact Details	
Change Password	Alter your password frequently to safeguard access to your information	
Secure Services / Services	Get access to and apply for all the other online services on offer on the Metropolitan Secure Services site. Just click the tickboxes and submit to subscribe.	Services go to the Metropolitan Application for Services page.



Odyssey Customer screens

Policy Information

POLICY INFORMATION	FUNCTION – All your policy details at a glance	ADDITIONAL NOTES
General	When you select a policy by clicking on the policy number under My Policies, this screen shows general information about the life insured and the insurance contract.	
Relationships	This screen shows all parties with an interest in a policy. The life insured is always reflected while the beneficiaries, payers and owner will only be listed if they are included in the contract or differ from the life insured.(see below)	
Contact Details	Easy access to the contact details of the parties listed under Relationships.	
Additional Investments	Any additional investments for the life insured are reflected here.	
Benefits	Lists all the benefits available under a selected policy, the benefit terms and the sums insured.	
Advisor Details	This screen will list the advisor's detail who implemented the policy.	
Policy Report	This convenient screen shows the policy owner's information and investment details. These pages can be exported to a printable document or saved as an email.	Enter for period when to when, click on PROCESS REQUEST. A pdf file will open in a new window.



Odyssey Customer screens

Financial

FINANCIAL	FUNCTION – no need phone in. Do online checks yourself	ADDITIONAL NOTES
Payment Detail / Payment History	Displays a policy's operational debit order details and last 12 payments for quick reference and trouble-shooting.	
Portfolio	This screen shows all investment portfolios to which a policy is linked and allows online switches between portfolios for selected Odyssey plans.	Clients can switch online
Income Funds selected (Only on Living Annuities)	You can select funds for income draw down on Odyssey Living Annuities.	
Expense Funds selected (Only on Living Annuities)	You can select from which funds expense deductions are paid on Odyssey Living Annuities.	
Switching	This switching option shows a screen with the number of existing units at the current unit price and the total rand value. You are able to switch funds online here, at no cost.	Clients can switch online
Loans	Shows loan, the start date, interest rate and outstanding balance taken with the Odyssey policy as security.	
Current Values	This screen helps you prepare and print a current policy values document. The produced document shows your investment's current value.	Click on Process Request, Click on Open, a pdf file will open.
Projected Values	This screen allows you to produce a printout showing the value of your policy or benefits at a selected future date.	You have the option to include AIB (automatic inflation benefit), future AIB up to a max of 20%, ages or terms, or a range of 5 different range options.
Portfolio Statements	Get a detailed list of all transactions for the period you specify on investments in the Odyssey Investment Plan range.	Enter a start and end date and click on Process Request.

Odyssey Customer screens

Annuities

ANNUITIES	FUNCTION	ADDITIONAL NOTES
General	This screen shows general contact details of the annuitant.	Only applicable for Odyssey Living Annuities
Payment Details	Displays the banking details to where the annuity income is paid.	
Living Annuities	Easy access to the living annuity details.	
Conventional Annuities	This screen shows the conventional annuity details.	
Payment History	Displays all the payments that the customer has received, less tax deduction and investment review fee.	

Click on LOGOUT under MY PROFILE to exit the secure site