PMI:
Personalised Brochure (SODAN)



GENISTAR
Financial Freedom For All

Version Control

Version	Status	Description of Amendment	Date of Amendment	Amended By
V1	Completed	Updates on SODAN for PMI applications	31.07.2024	Tapashya Sunuwar

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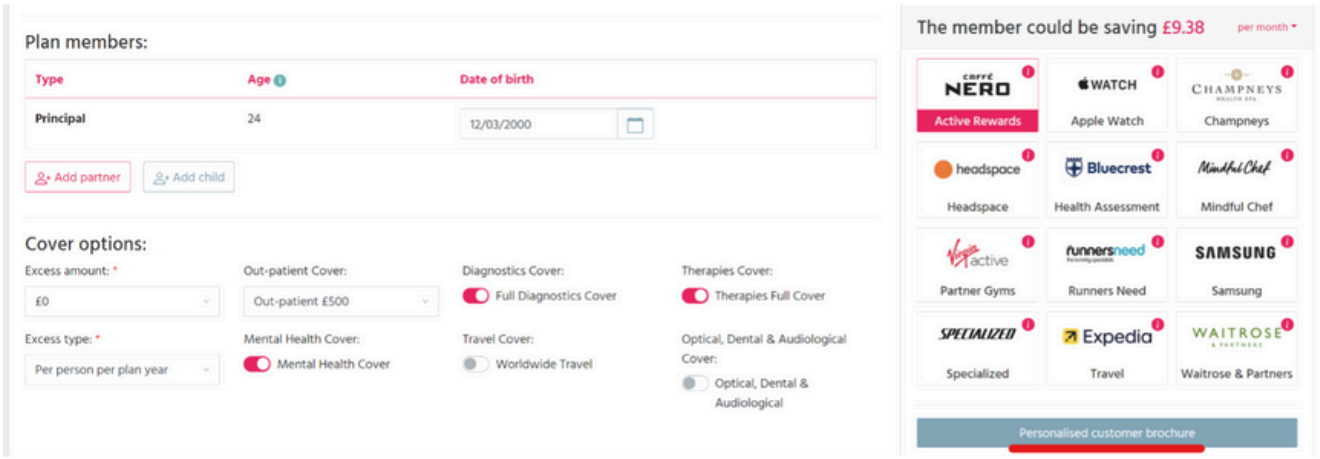
1. **Personalised brochure**

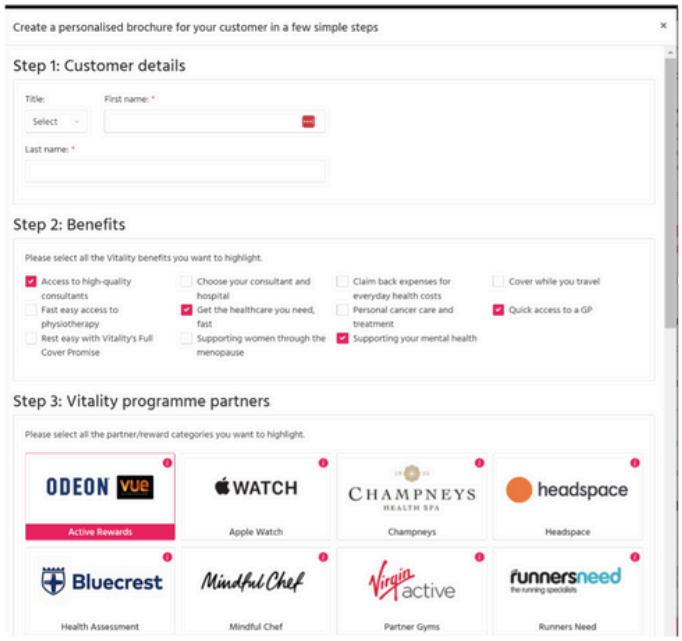
- We would like to inform you that you do not need to use the original PMI SODAN template going forward, instead please use the option on Vitality Health hub to create and download the "Personalised brochure" for the client. This document will replace the SODAN.

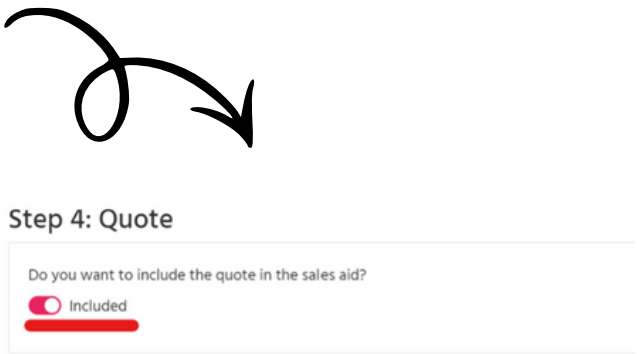
- In there you can also select all the topics that you would like to highlight for the client's needs and cover of choice along with the summary of their selected quote.

- A box will appear where you will need to disclose the client's details, please toggle "Included" under Step 4 "Do you want to include the quote in the sales aid?".

- This document is informative and personalised to the client's specific needs therefore meeting the SODAN requirement.



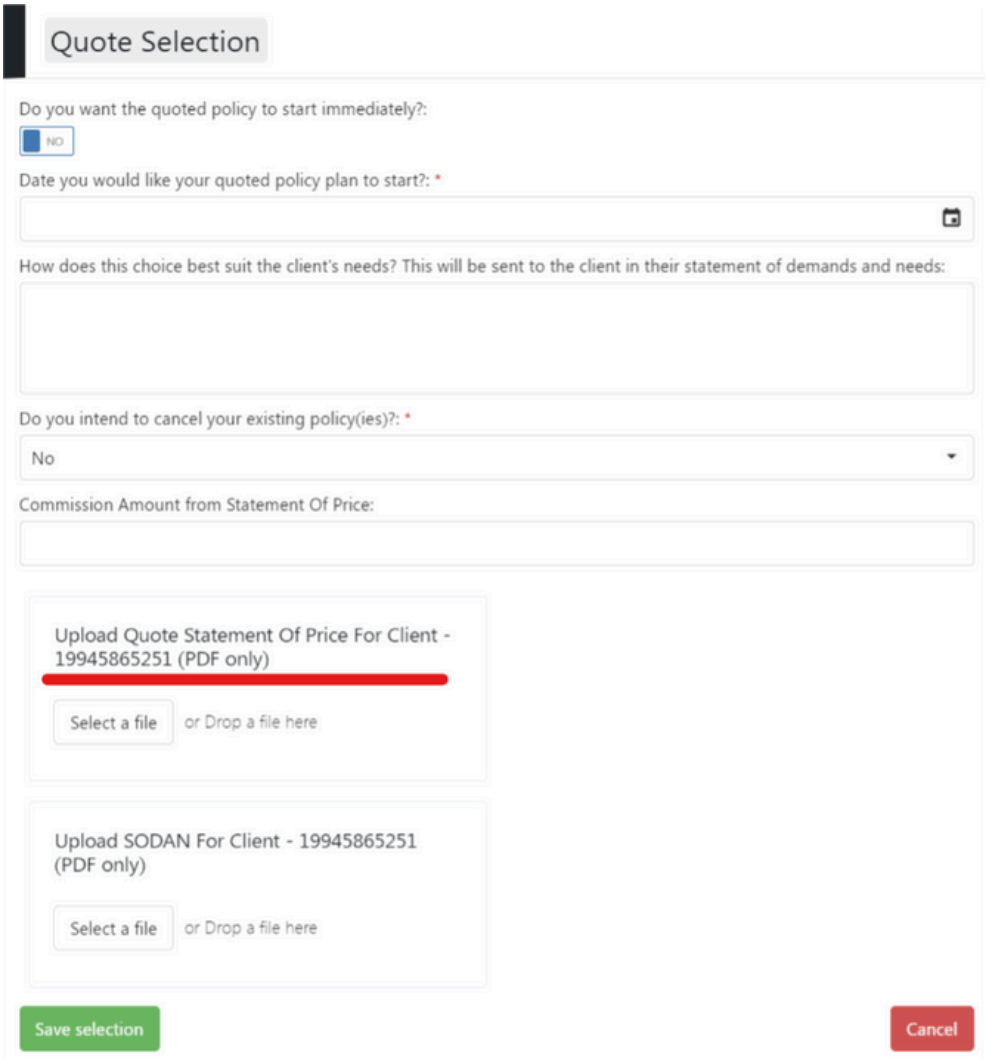




2. Uploading document

- You will need to download the "Personalised brochure" document from the health hub once the client has made their quote selection.

- Then, you will need to upload it in the PMI protection option section of Genistar online, under Quote. Please note, in the interim, you will need to upload the same document in the upload section for SODAN.

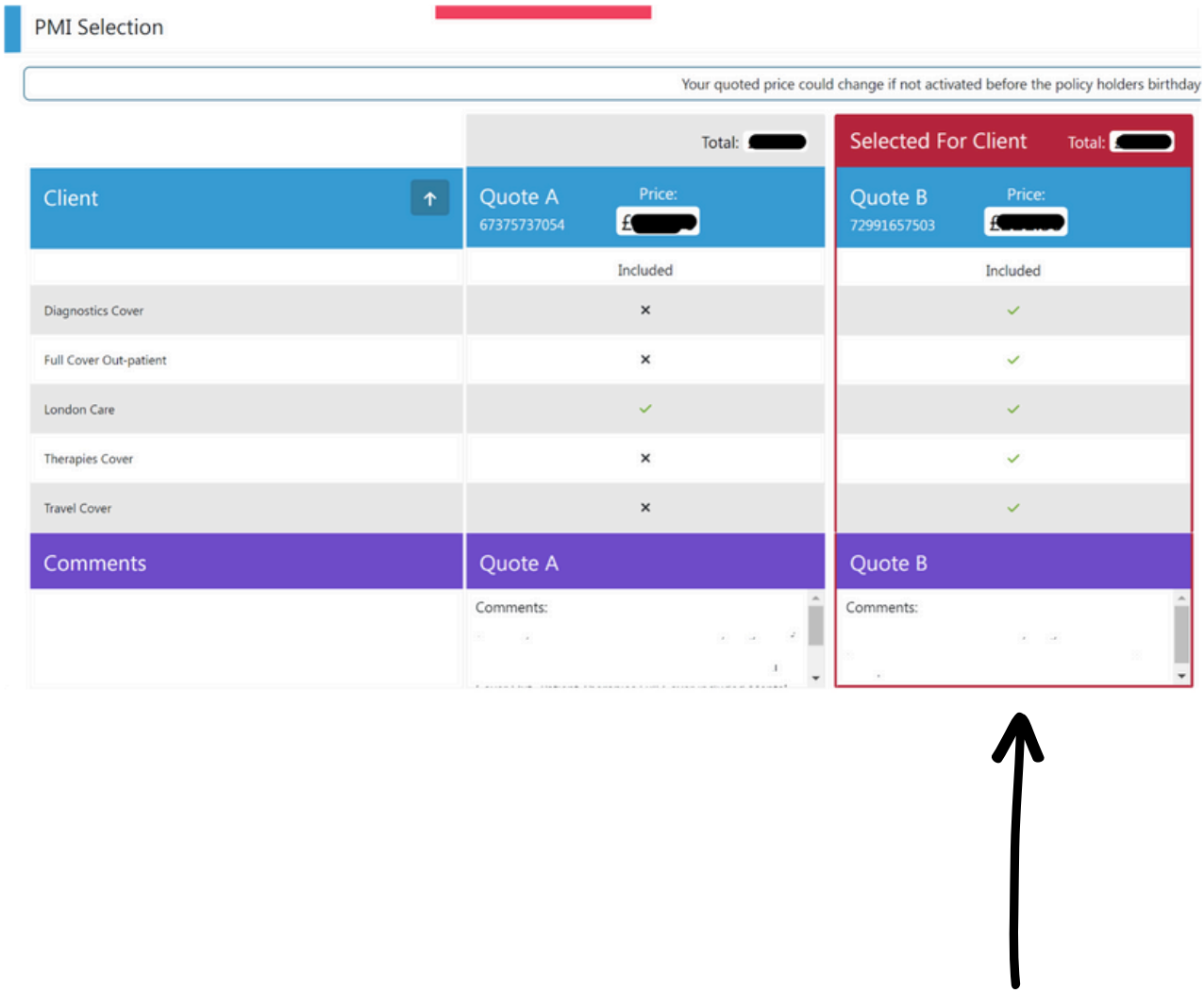


- We have requested for the IT team to remove the SODAN upload section from the PMI protection option as all details will be in the 'personalised brochure' under the quote upload going forwards.

3. Sending personalised brochure (SODAN)

- Please note, we will also add a tick box in the protection option section, as a declaration to confirm that a copy of the **"Personalised brochure"** has been sent to the client. This provides confirmation we have met the SODAN requirement for the client.

- Until this new tick box is added in the system, **please make sure you send a copy of the personalised brochure to the client by email once they have confirmed their selected quote** and they have confirmed they wish to proceed.



- **Please provide a soft note in the comment section of the protection option to state the date it was sent.**

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