

# VitalityLife Adviser checklist.

## Helping you in your client conversations.

This guide has been created to showcase key assets including sales aids, interactive PDFs, online tools and client videos that can be used by you before, during and after your client appointments.

These assets will help you discuss protection with your client, ensuring that they have all the tools necessary to understand and benefit from their Vitality plan.

What stage is your client at within the protection conversation?	To use with your clients	For adviser use
<b>1 Pre-appointment</b> A selection of assets which provide a high level overview for your clients before any detailed conversations	<ul style="list-style-type: none"> <li>› <a href="#">VitalityLife Interactive Guide</a></li> <li>› <a href="#">Serious Illness Cover video</a></li> <li>› <a href="#">Later Life Options video</a></li> <li>› <a href="#">Optimiser video</a></li> <li>› <a href="#">Casper's Claims Story video</a></li> </ul>	<ul style="list-style-type: none"> <li>› <a href="#">Target Market Assessment</a></li> <li>› <a href="#">Vitality Academy Training Modules</a></li> <li>› <a href="#">Underwriting Guide</a></li> <li>› <a href="#">Occupation Guide</a></li> </ul>
<b>2 During the appointment</b> More detailed product information and guides to focus on your clients specific protection needs	<ul style="list-style-type: none"> <li>› <a href="#">Optimiser Guide</a></li> <li>› <a href="#">Serious Illness Cover Guide</a></li> <li>› <a href="#">Mortgage Serious Illness Cover Guide</a></li> <li>› <a href="#">Later Life Options Guide</a></li> <li>› <a href="#">Income Protection Cover Guide</a></li> <li>› <a href="#">Whole of Life Guide</a></li> <li>› <a href="#">Risk Calculator Tool</a></li> <li>› <a href="#">The Power of the Plan Account with Serious Illness Cover</a></li> </ul>	<ul style="list-style-type: none"> <li>› <a href="#">VitalityLife Plan Builder</a></li> <li>› <a href="#">Serious Illness Cover Conditions Covered Tool</a></li> <li>› <a href="#">Serious Illness vs. Critical Illness Cover Tool</a></li> <li>› <a href="#">Premium Comparison Tool</a></li> <li>› <a href="#">Personal Protection App Form with Standard Underwriting</a></li> <li>› <a href="#">Personal Protection App Form with Optimiser Underwriting</a></li> <li>› <a href="#">Personal Protection Suitability Letter</a></li> </ul>
<b>3 After the appointment</b> Ensure your clients understand their plan and engage through the Vitality Programme longer term	<ul style="list-style-type: none"> <li>› <a href="#">Discounts and Rewards Guide</a></li> <li>› <a href="#">Discount and Rewards Guide NI</a></li> <li>› <a href="#">Member Zone</a></li> <li>› <a href="#">Vitality Nurses Brochure</a></li> <li>› <a href="#">Making the most of Vitality Guide</a></li> <li>› <a href="#">Understanding Vitality Shared Value Insurance video</a></li> <li>› <a href="#">Vitality Programme video</a></li> </ul>	<ul style="list-style-type: none"> <li>› <a href="#">Servicing your clients plans videos</a></li> </ul>

## Working with us - additional support and useful links

We offer a range of additional support and training opportunities to help you understand and sell Vitality to your clients.

### Personalised training from your Vitality Business Consultant

Our extensive network of regionalised Vitality Business Consultants, who are based across the UK, are on hand to provide personalised training to suit both you and your firm. This training can be done virtually or on a face-to-face basis, in adherence to the UK Government's Covid-19 guidelines.

**For further information, please get in touch with your firm's appointed Vitality Business Consultant or call 0808 234 3000.**

### The Vitality Academy online adviser training

Built around you, The Vitality Academy makes it more convenient than ever to learn and stay up-to-date with industry knowledge, trends, and Vitality products. We offer digital learning where convenience is key. It's easy to dip in and out, with simple access through mobile devices too.

› [Find out more and register](#)

## Other useful links

- › [Vitality Adviser website](#) - where you'll find everything you need to know about us
- › [Literature Library](#) - access to a range of assets for you to download and email to your clients
- › [Online Tools](#) - a range of tools to help grow your business
- › [Adviser Hub](#) - register now to start selling VitalityLife plans
- › [Commission](#) - find out about our commission services and how to view your statements
- › [Underwriting](#) - learn more about our underwriting process, including limits and disclosures
- › [Contact us](#) - making it easier for you to do business
- › [Press and media centre](#) - visit to read our latest press releases
- › [Insights Hub](#) - original research and industry debate on the most inspiring subjects

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**Don't forget to follow us on our adviser social media channels to stay up to date with everything happening in the world of Vitality.**

**Follow us on:**

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