



WinBEAT4 Application Form



Company Details

Company Name:

Trading as (if Applicable):

ABN:

Company Contact Details

Phone:

Fax:

Business Website Address (if applicable):

Company Address(es)

Address:

Postal Address (if different from above):

Type of business

- Registered Broker
- Authorised Representative
- Underwriting Agency

AFS License No:

WinBEAT Application Type

- Single User Only. (Any 1 user logged in at any one time)
- or
- Multi-User. Initial User Level Required:

What system are you currently using (if any)

Desired Contract
Start Date

DD

MM

YYYY

Do you require a quotation for a conversion of
your existing data? Yes No

Primary Contact

Name:

Position:

Phone:

Email:

Electronic Trading

Do you require a Sunrise
Exchange connection? Yes No

Do you currently use
Sunrise Executive? Yes No

Do you require a quote to
convert your information
to Sunrise Exchange?
(skip question if you answered "No" to previous question)

Yes No

How did you find out about WinBEAT?

- Associate Insurer Prev. Association
- Internet Other:

Please specify

Are you a member of any of the following groups?

- National Insurance Brokers Association (NIBA)
- Steadfast Insurance Brokers Management Group Ltd
- Insurance Brokers Network Australia (IBNA)
- Insurance Advisers Association of Australia (IAAA)
- Australasian Association of Insurance Brokers (AAIB)
- Austbrokers
- Council of Queensland Insurance Brokers Inc. (CQIB)
- Underwriting Agencies Council (UAC)

Return to Ebix by

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Thank you

Thank you for choosing WinBEAT for your back-office system. For your application status contact Andrea Lawton at [03 9899 3388](tel:0398993388) or free call [1800 807 139](tel:1800807139) outside the Melbourne metro area, or alternatively email andrea@ebix.com.au. Please allow 5 - 7 working days for processing and mailing.

What next?

On receipt of this application, we will prepare the WinBEAT Software and Support Agreement. This agreement will be forwarded to you, together with quotations for the once-only WinBEAT Forms License and WinBEAT Connection Fee with your initial quarterly subscription. Training options will also be included with this initial kit. The activation of one or more WinBEAT options may be requested at any time after you have initially installed WinBEAT on your PC or network.

A note on WinBEAT User Levels

User Levels may be subsequently increased or decreased on request by a simple phone call. WinBEAT subscription rates are based on the User Level. The WinBEAT user level is defined as the maximum number of users able to log into a WinBEAT portfolio at any one time. WinBEAT subscription rates include one scheduled training course credit for one person per annum.

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