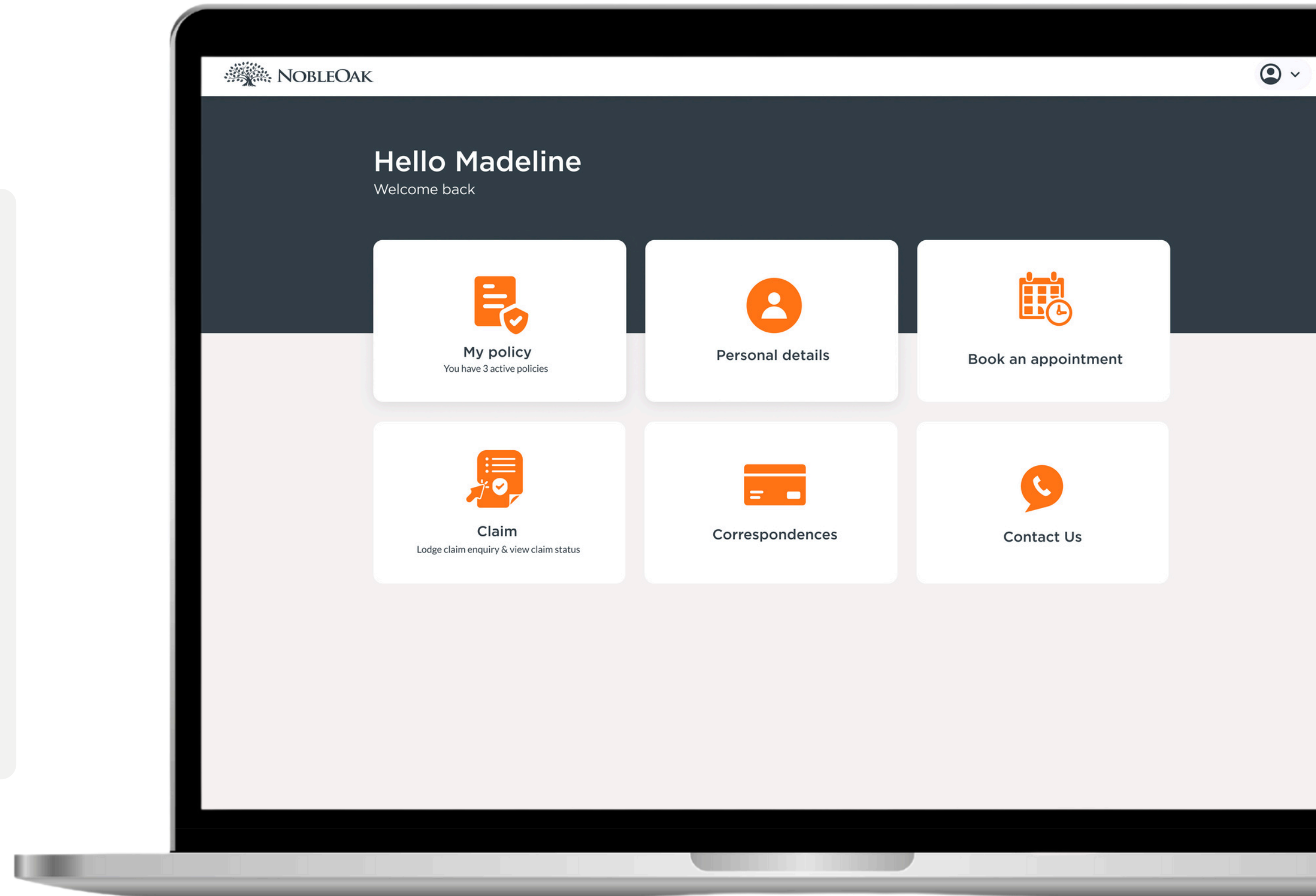




# NobleOak Client Portal - Your User Guide





**The NobleOak Client Portal** gives you convenient and secure access to manage your life insurance policies, all in one place.

Through the Portal, you can:



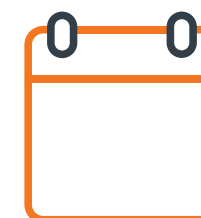
**Update your  
personal details**



**Book  
appointments**



**View  
correspondence and  
product information**



**Access claims-  
related documents  
or lodge a claim**



# What you will need to access the Portal

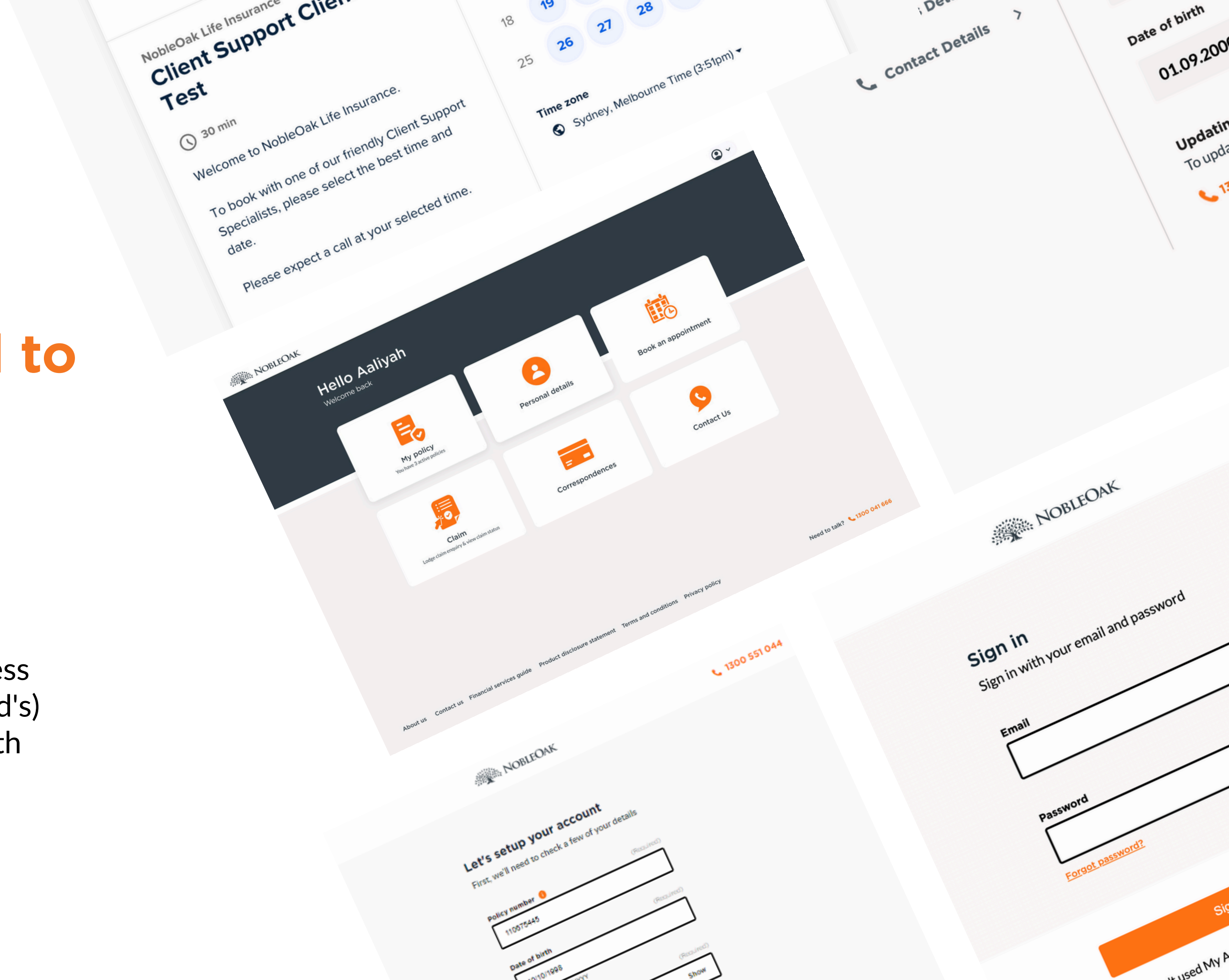
- Your policy number
- Chosen password

## Individual:

- Email address (Policy Owner)
- Date of Birth

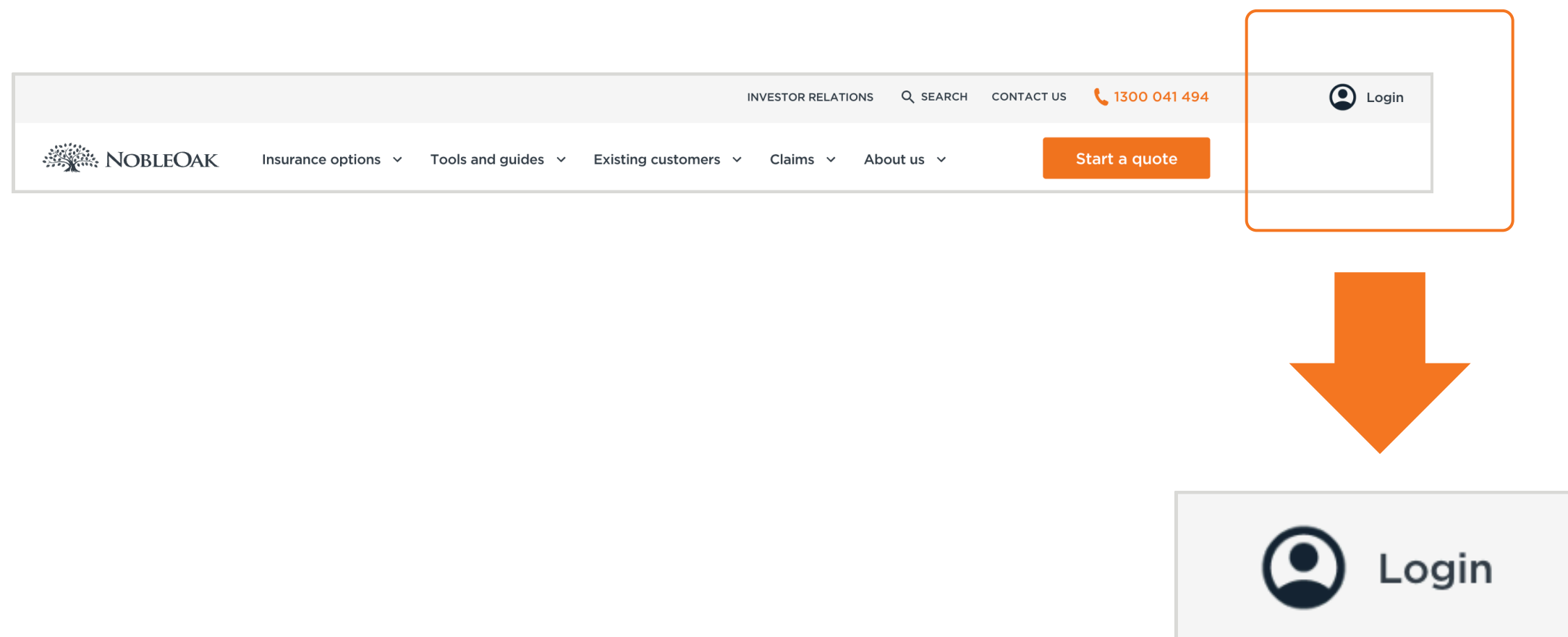
## SMSF:

- Email address (Life Insured's)
- Date of Birth

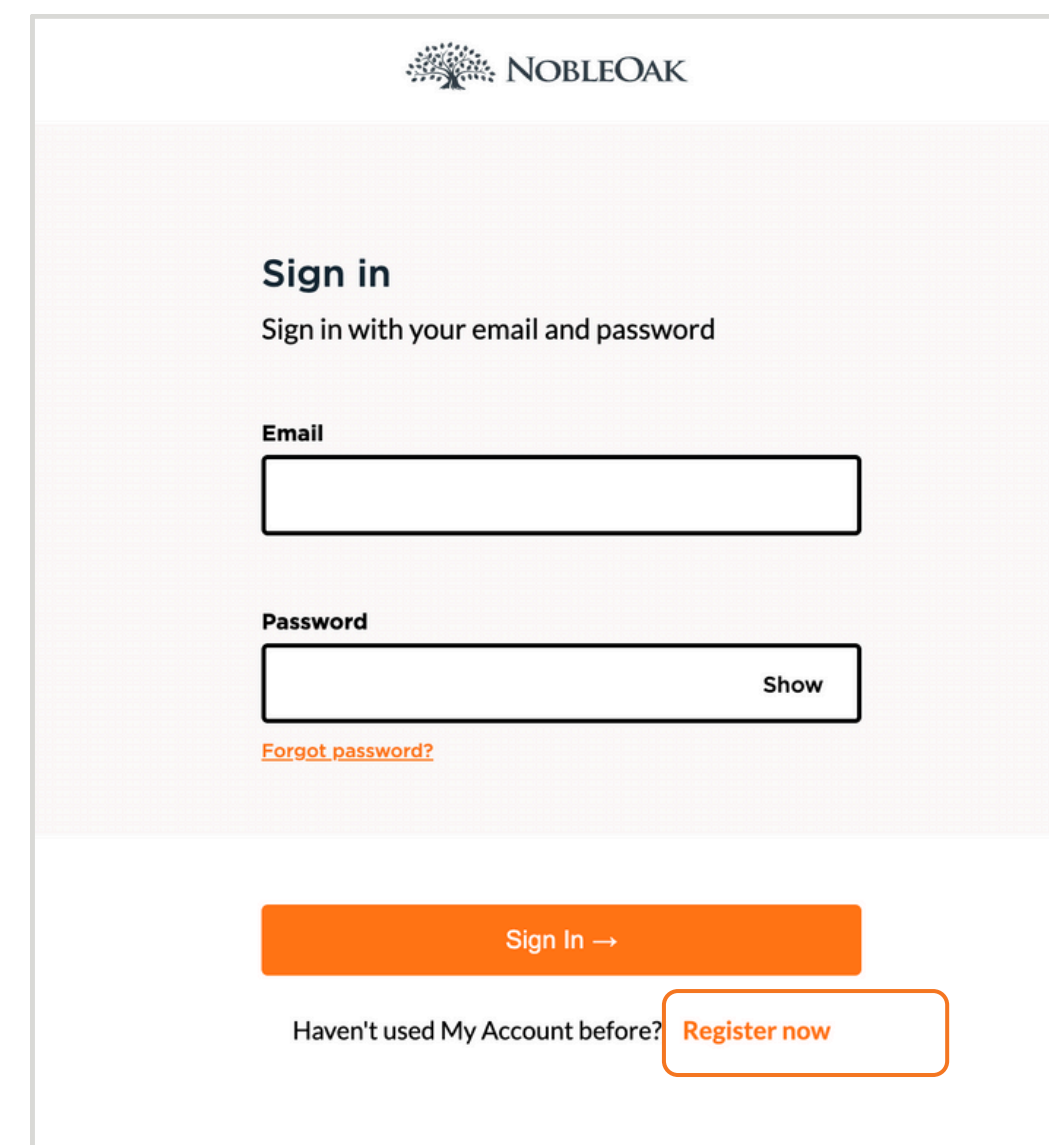


# How to register

1. On our website, you will see a “Login” button in the top banner of our website..



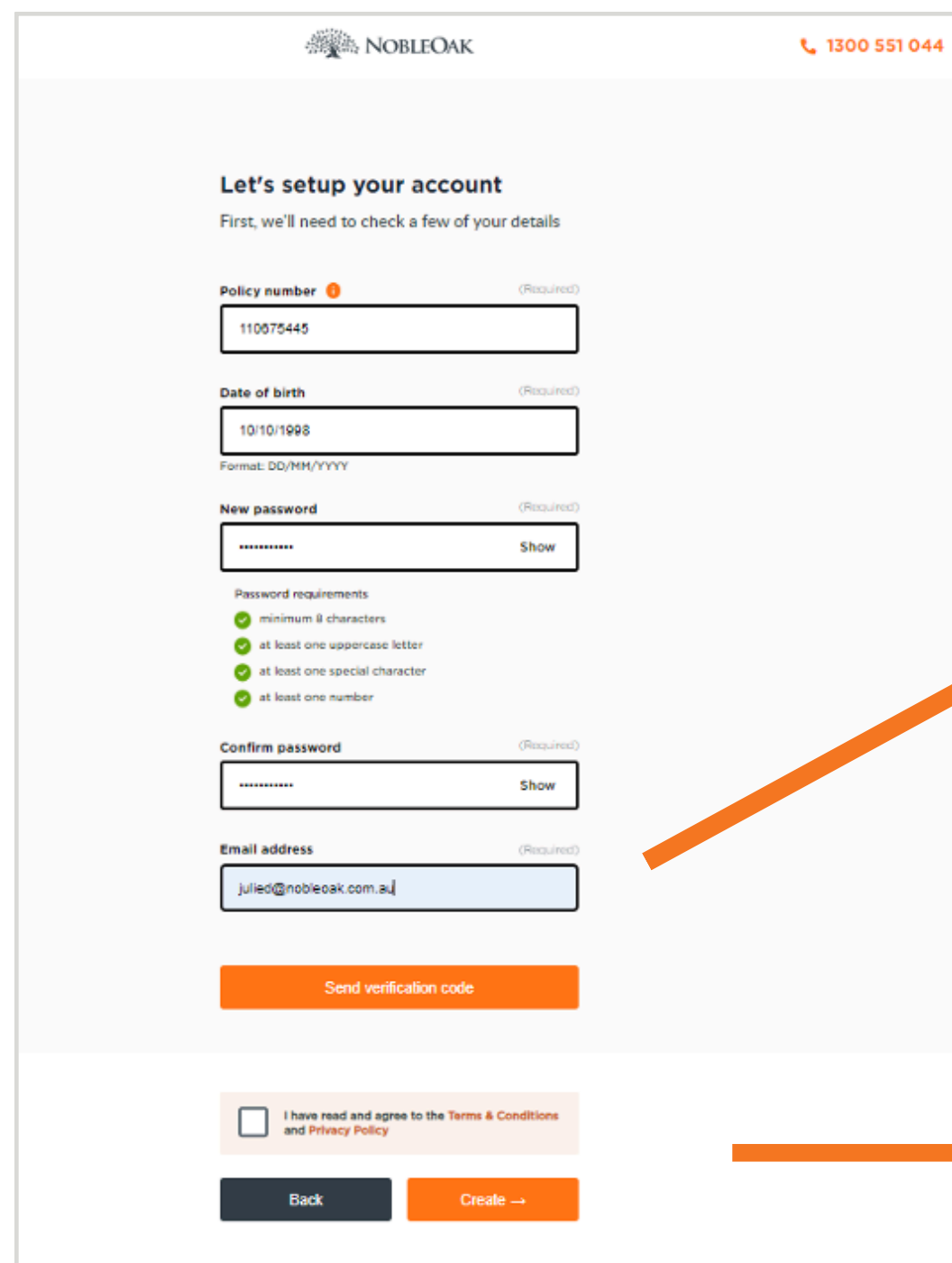
2. Select “Register now” and setup your account



The image shows a screenshot of the NobleOak 'Sign in' page. The page includes the NobleOak logo, a 'Sign in' heading, and a subheading 'Sign in with your email and password'. Below this are input fields for 'Email' and 'Password', a 'Show' button for the password field, and a 'Forgot password?' link. At the bottom, there is a 'Sign In →' button and a 'Haven't used My Account before?' link, which is highlighted with an orange box and labeled 'Register now'.

# Setup your account

1. Enter in your details (case sensitive)



Let's setup your account  
First, we'll need to check a few of your details

Policy number (Required)  
110075445

Date of birth (Required)  
10/10/1998  
Format: DD/MM/YYYY

New password (Required)  
[password field] Show

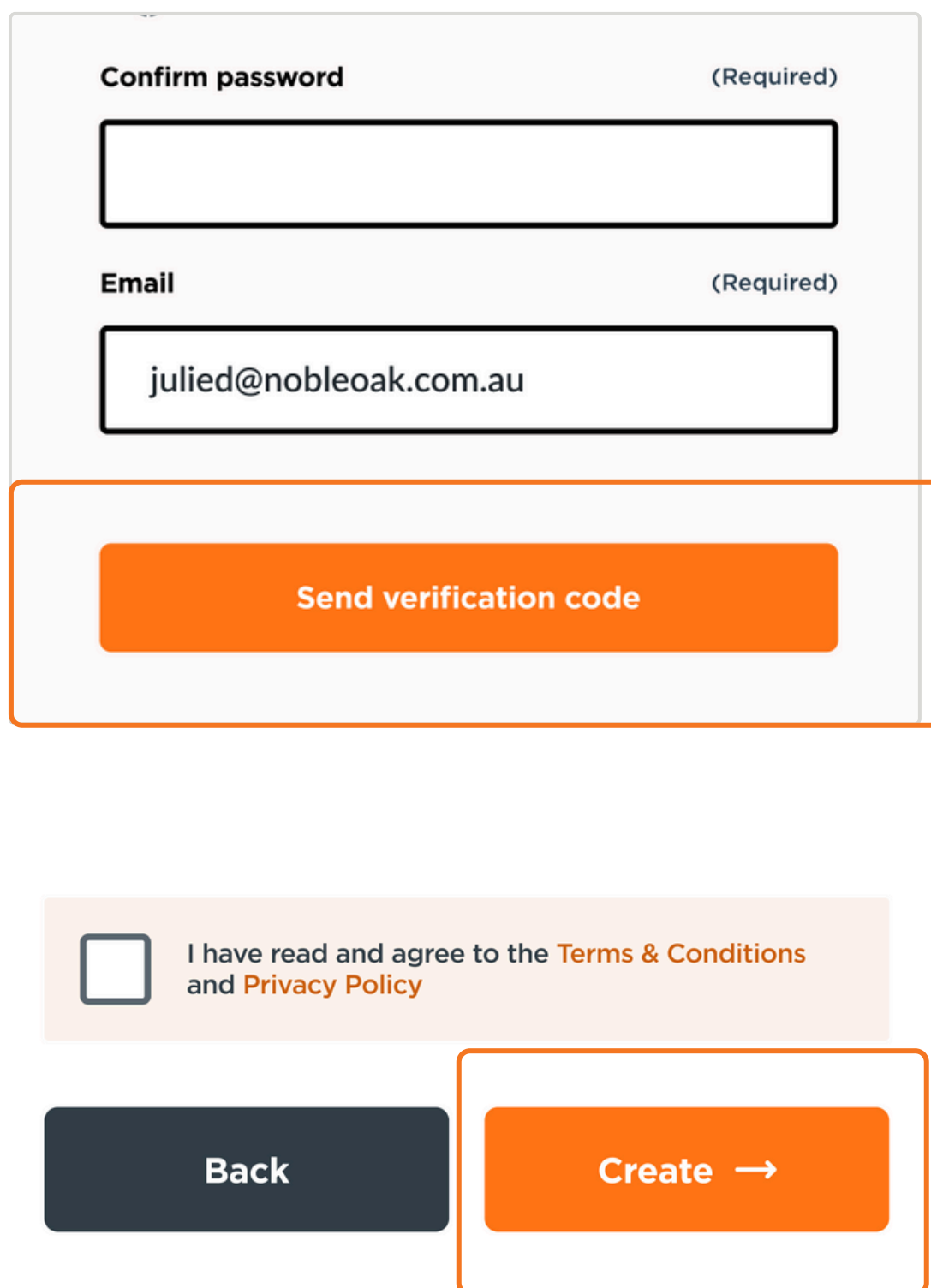
Confirm password (Required)  
[password field] Show

Email address (Required)  
julied@nobleoak.com.au

Send verification code

☐ I have read and agree to the Terms & Conditions and Privacy Policy

Back Create →



Confirm password (Required)  
[password field]

Email (Required)  
julied@nobleoak.com.au

Send verification code

☐ I have read and agree to the Terms & Conditions and Privacy Policy

Back Create →

2. Select “Send verification code” button. (This will be sent to the email address entered by you).

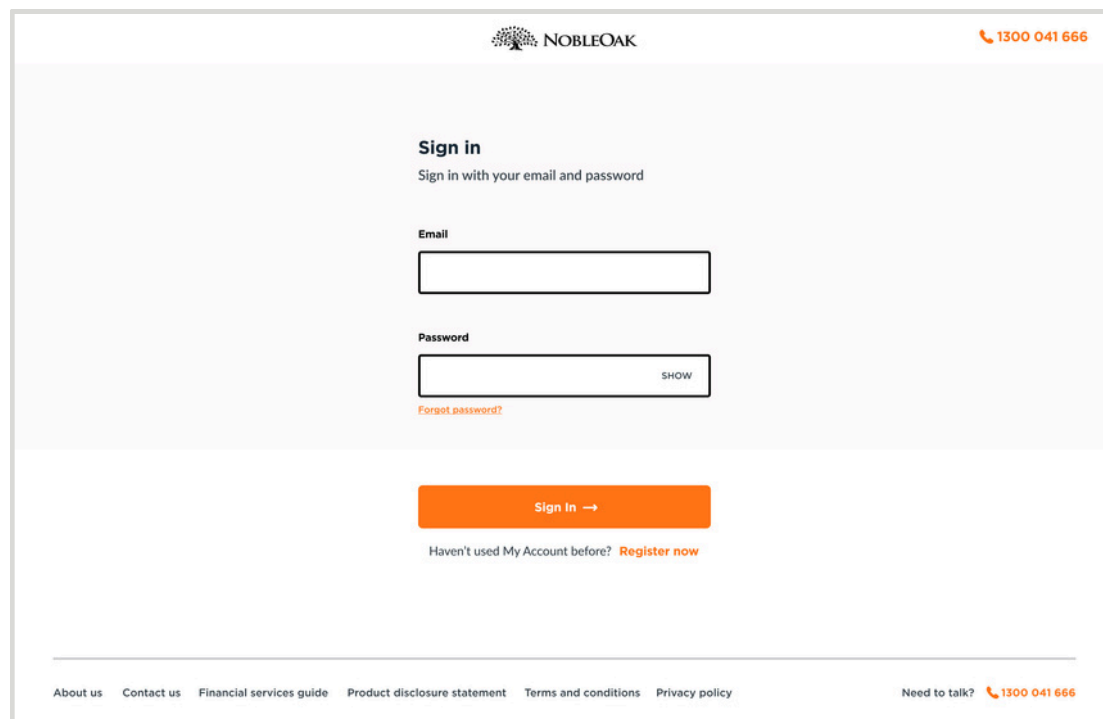
3. Enter the verification code you received and select Verify code.

4. After the verification code, you need to check all details entered are correct and click the box to agree to the terms and conditions and select Create.



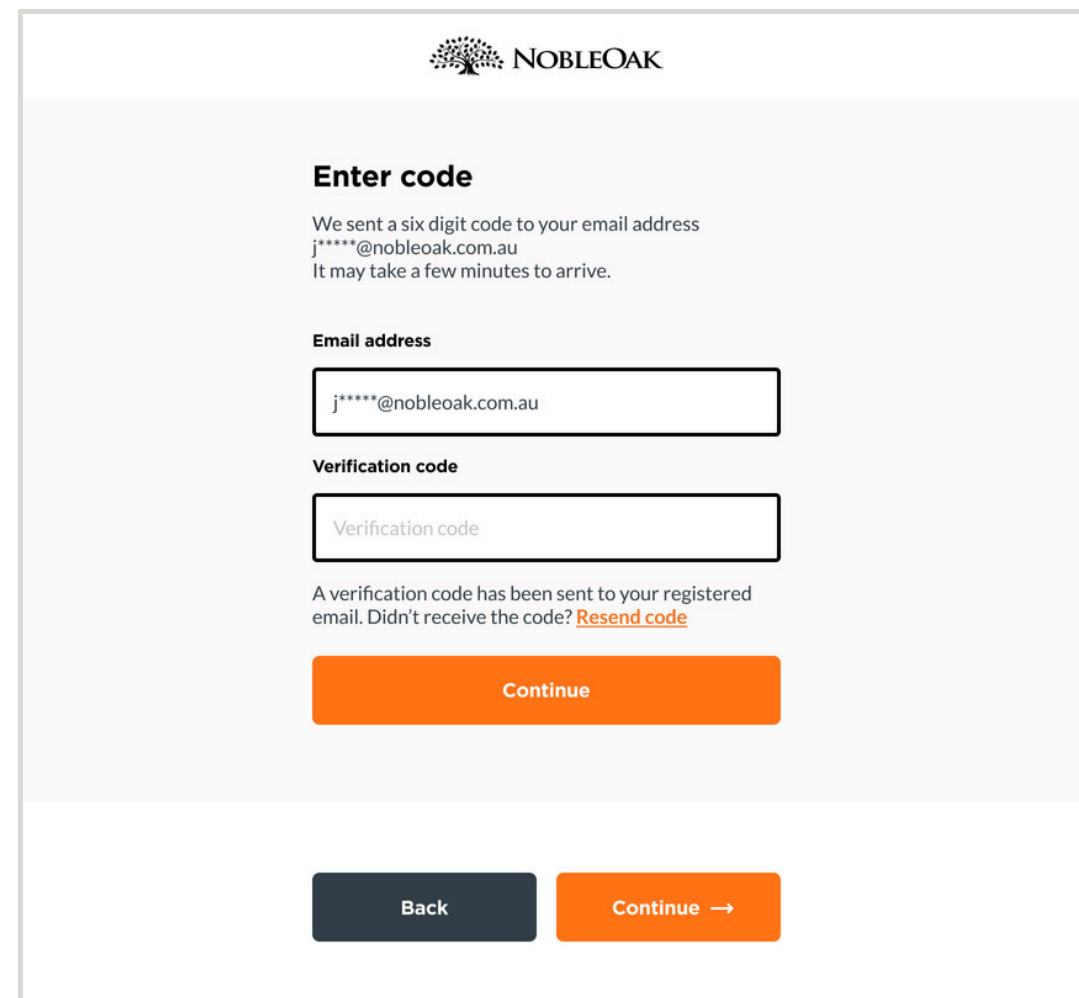
# How to log in (after you have registered)

1. You will need to **enter the email address** you registered with and the chosen **password**.



The screenshot shows the NobleOak 'Sign in' page. At the top, the NobleOak logo and a phone number '1300 041 666' are visible. The main heading is 'Sign in' with the subtext 'Sign in with your email and password'. Below this are two input fields: 'Email' and 'Password'. The 'Password' field has a 'SHOW' button and a link 'Forgot password?'. A large orange 'Sign in →' button is centered below the fields. At the bottom, there is a link 'Haven't used My Account before? Register now'. The footer contains links: 'About us', 'Contact us', 'Financial services guide', 'Product disclosure statement', 'Terms and conditions', 'Privacy policy', and 'Need to talk? 1300 041 666'.

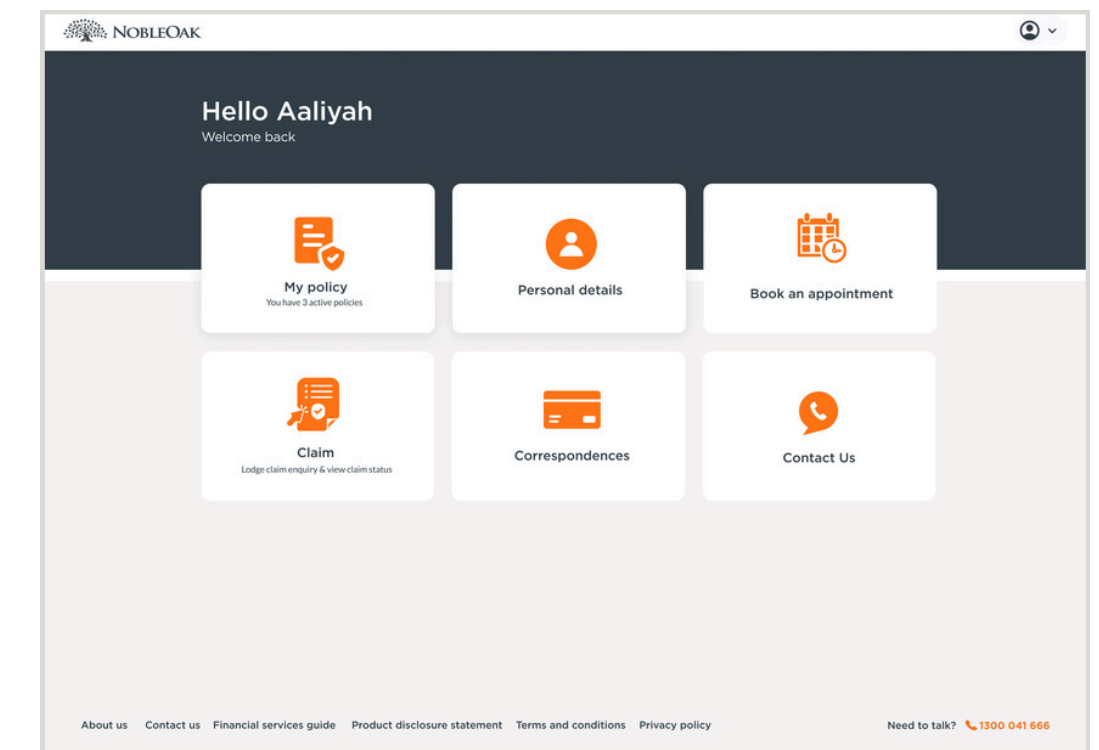
2. Select the **sign-in** button, and you will be prompted to **enter a verification code**.



The screenshot shows the NobleOak 'Enter code' page. At the top, the NobleOak logo is visible. The main heading is 'Enter code' with the subtext 'We sent a six digit code to your email address j\*\*\*\*\*@nobleoak.com.au. It may take a few minutes to arrive.' Below this is an 'Email address' field containing 'j\*\*\*\*\*@nobleoak.com.au'. Underneath is a 'Verification code' field. A message states: 'A verification code has been sent to your registered email. Didn't receive the code? Resend code'. A large orange 'Continue' button is centered below the fields. At the bottom, there are two buttons: 'Back' and 'Continue →'.

3. This code will get sent to your email address and once you have entered it in then you select the **Verify code** button.

4. After you are successfully **logged in**, you will see the following dashboard.



The screenshot shows the NobleOak user dashboard for 'Aaliyah'. At the top, the NobleOak logo and a user profile icon are visible. The main heading is 'Hello Aaliyah' with the subtext 'Welcome back'. Below this are six tiles: 'My policy' (You have 3 active policies), 'Personal details', 'Book an appointment', 'Claim' (Lodge claim enquiry & view claim status), 'Correspondences', and 'Contact Us'. The footer contains links: 'About us', 'Contact us', 'Financial services guide', 'Product disclosure statement', 'Terms and conditions', 'Privacy policy', and 'Need to talk? 1300 041 666'.

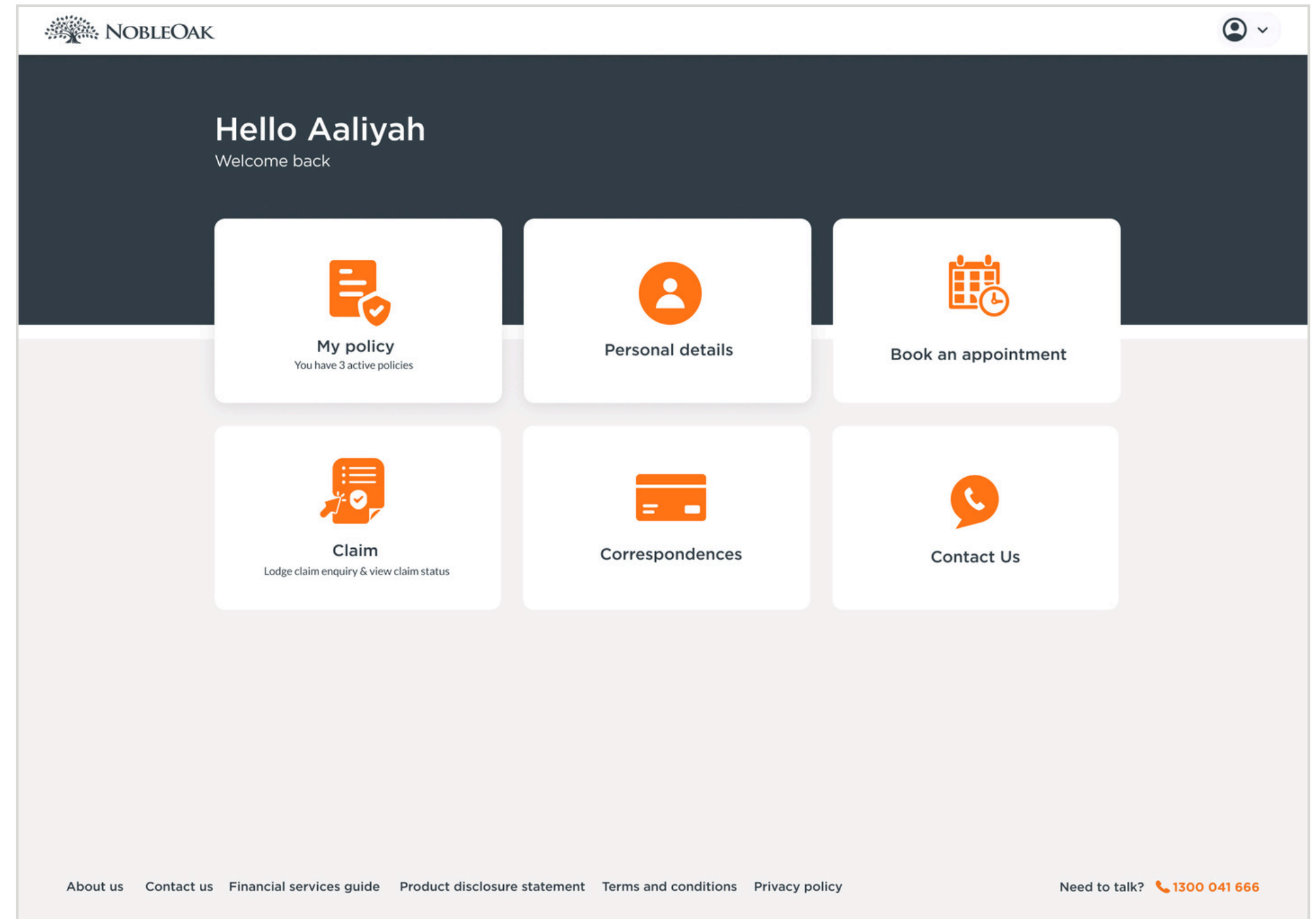
# What you can do in the Portal

## My Policy:

(This option will only show if your cover is in an active status)

You will be able to view the following items:

- Policy and coverage details
- Beneficiaries



# What you can do in the Portal

## Personal details


You can update the following details under this tab:


- Payment details (Only regular premium payments will be updated)
- Address details
- Contact number


If you need to update your name or email details, you will need to contact us directly.


ACCOUNT SETTINGS

### Your Profile

 **Personal Details** >

 **Payment Method** >

 **Address Details** >

 **Contact Details** >

First name

Aaliyah

Last name


James


Date of birth


01.09.2000

**Updating your personal details**

To update your personal details, please contact us on:

 **1300 551 044**

 **enquiry@nobleoak.com.au**

Why can't I update my personal details myself 





# What you can do in the Portal

## Book an appointment:

If you'd like an appointment to talk to one of the NobleOak team, you can schedule this in the Portal. You can schedule an appointment to be contacted on a date and time that suits you best.

The screenshot shows the NobleOak Client Support Portal Test interface. On the left, there's a sidebar with the NobleOak logo, the text "NobleOak Life Insurance", and "Client Support Client Portal Test". Below this, it says "30 min" and "Welcome to NobleOak Life Insurance." followed by instructions to book an appointment. On the right, there's a "Select a Date & Time" section with a calendar for August 2025. The calendar shows days from Monday to Sunday, with dates 1 through 31. The date 8 is highlighted. Below the calendar, there's a "Time zone" section with a dropdown menu showing "Sydney, Melbourne Time (3:51pm)".

## Correspondence:

You can view and download the correspondence related to your policies.

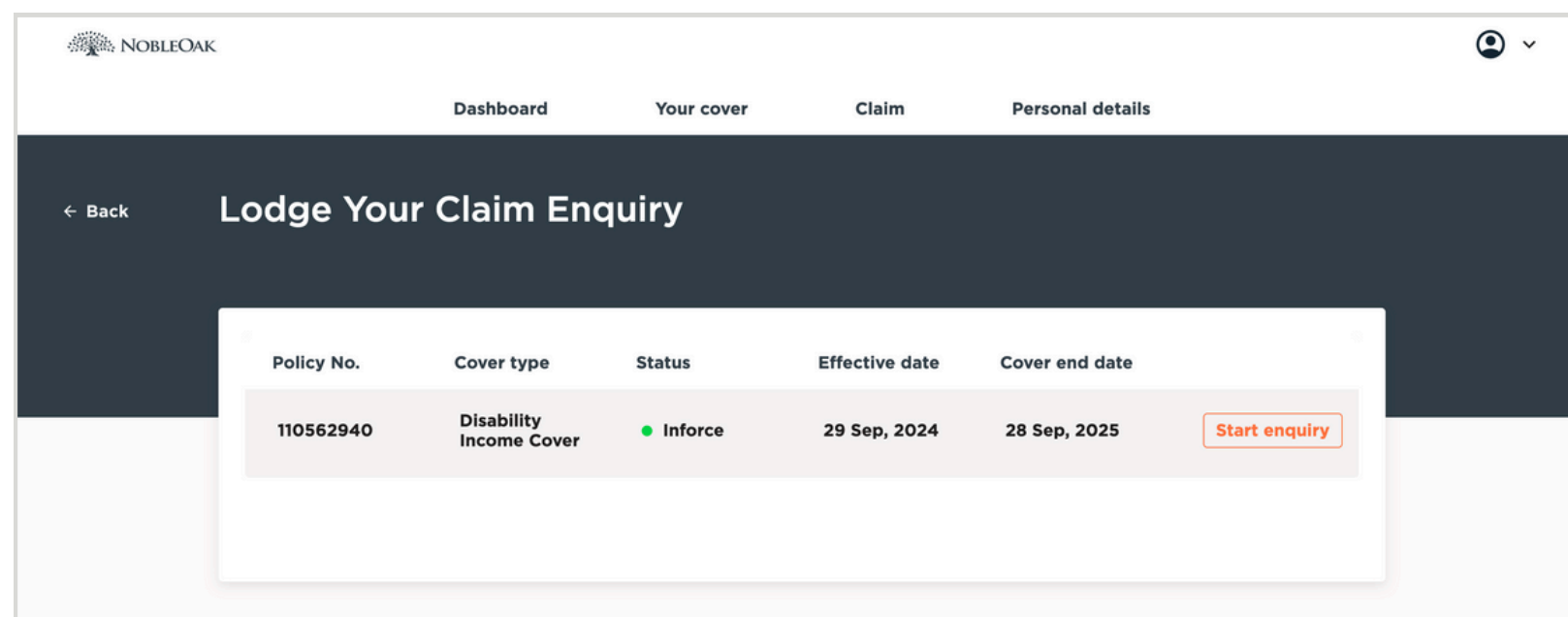
The screenshot shows the NobleOak Correspondence page. At the top, there's a navigation bar with "Dashboard", "Your cover", "Claim", and "Personal details". Below this, there's a "Correspondence" section with a "Back" button. A list of documents is shown, including "Policy Renewal Letter 1" and "Policy Renewal Letter 2", each with a "Download" button.

# What you can do in the Portal

## Claims

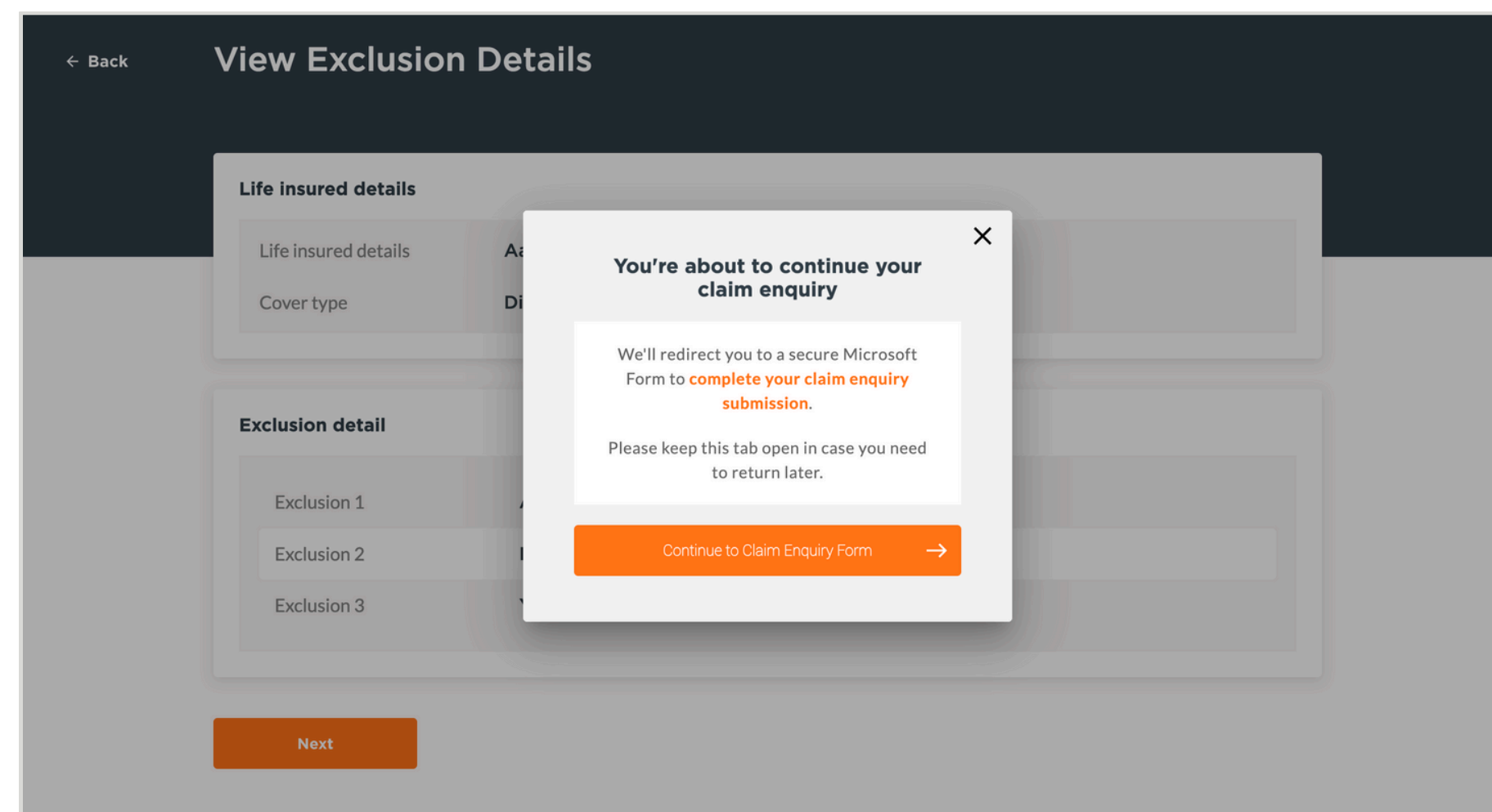
Within the claims tab, you can do the following:

- Lodge a Claim enquiry (by selecting the start enquiry button)



| Policy No. | Cover type              | Status                                       | Effective date | Cover end date |                               |
|------------|-------------------------|--|----------------|----------------|-------------------------------|
| 110562940  | Disability Income Cover | <span style="color: green;">●</span> Inforce | 29 Sep, 2024   | 28 Sep, 2025   | <a href="#">Start enquiry</a> |

- Claim enquiry and see exclusions



**You're about to continue your claim enquiry**

We'll redirect you to a secure Microsoft Form to **complete your claim enquiry submission**.

Please keep this tab open in case you need to return later.


[Continue to Claim Enquiry Form](#)



# What you can do in the Portal

## Claims

- Claim enquiry Form

 **Claim Enquiry Form for Income Protection**

NOBLEOAK

Please provide your responses to help us assess your claim enquiry.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

\* Required

Policy Number \*

The value must be a number

First Name \*

Enter your answer

Last Name \*

Enter your answer

Email Address \*

Please enter an email


What is the nature of your injury or illness?

Enter your answer

# What you can do in the Portal

## Claims

- View claims status and details



DashboardYour coverClaimPersonal details

← Back

Claims Status

| Claim number | Claim type        | Policy number | Claim date   | Claim status     |                                    |
|--------------|-------------------|---------------|--------------|------------------|------------------------------------|
| CLM-3939     | Income Protection | 110562940     | 23 Jun, 2025 | Under Assessment | <a href="#">View claim details</a> |

×

Claim details

Claim details

Benefit/cover type

Income Protection

Benefit period

Five years

Waiting period

30 days

Benefits commenced

05/06/2025

Claim overview

Claim status

Under assessment

Payment details

Next payment date

23 July, 2025

Gross benefit

\$348.02

Case manager info

Name

Beth Sular

Contact number

(02) 8123 2667