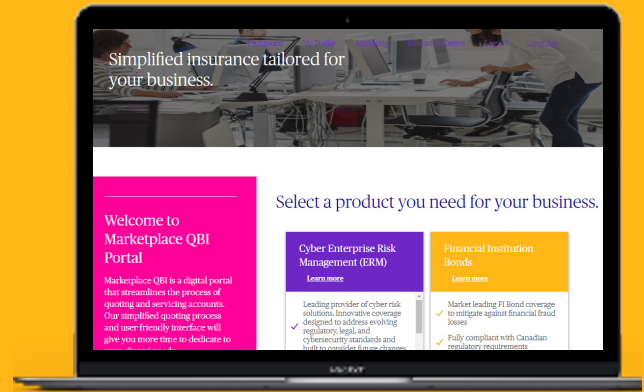


Your simple guide to our nimble platform



PART ONE: FAQs

The fundamentals

01

How do I get login access to Marketplace QBI?

Click [here](#) to request access.



02

I am already registered, how do I access Marketplace QBI?

Go to broker.chubbinsurance.ca/qbi/ and use your existing credentials to log in.



03

What products can I quote on Marketplace QBI?

Marketplace QBI offers Chubb's Financial Institution Bond Product for Asset Managers. In addition, the platform offers our Cyber Enterprise Risk Management (ERM) product on a stand alone basis.



04

What if I quote other lines beyond Cyber and Financial Institution Bond?

Marketplace QBI currently only offers our Cyber ERM and FI Bond products on a stand alone basis. If you are quoting multiple lines of business please reach out to your local underwriter.



05

What types of businesses can I quote on Marketplace QBI?

Our FI Bond product is available on Marketplace QBI for the following types of asset managers

- Exempt market dealers
- Investment fund managers
- Portfolio managers
- Restricted portfolio managers



06

What FI Bond quotes should I submit to Marketplace QBI?

Quote, bind and issue FI Bond insurance with ease for organizations that meet the following criteria:

- Seeking limits from \$50,000 up to \$10M
- No existing FI Bond insurance with Chubb
- No FI Bond claims within the past 5 years
- Not subject to any regulatory investigations



07

Can I save a new business quote that I'm currently working on and complete it later?

Yes! Marketplace QBI saves your progress as you go. Just visit the dashboard to edit a quote or continue from where you left off.



08

How can I share quotes in Marketplace QBI with my clients?

Yes, once a quote is complete you can easily download and share all the quote information and policy options.

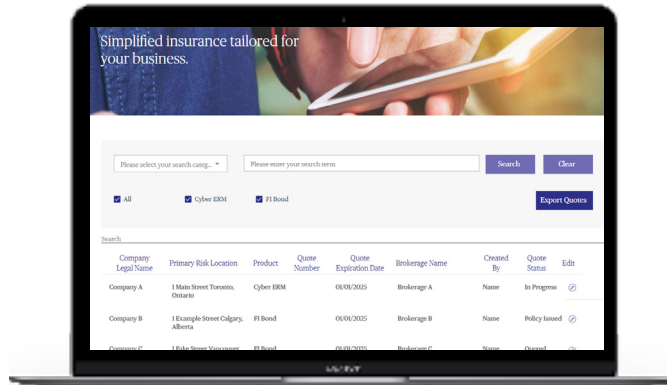


PART TWO: PLATFORM WALKTHROUGH

Here's a breakdown of the site's key pages and how they can help you

01

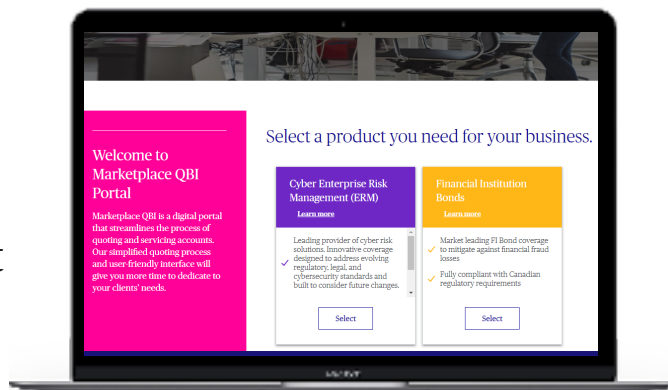
Homepage/ dashboard



- Latest notifications
- Your list of recent quotes
- Access to edit your existing quotes

02

Product selection & client information

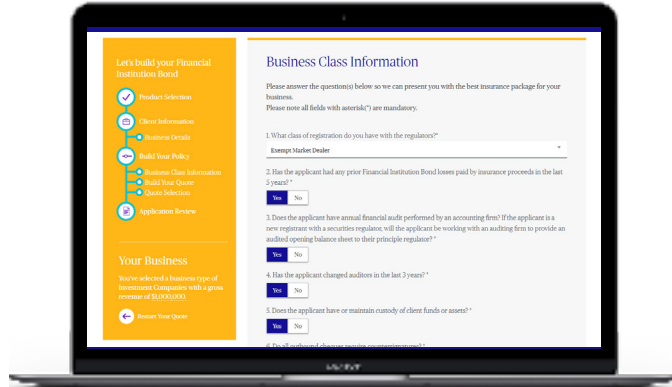


You have two options: **begin a Cyber quote or a Financial Institution Bond quote.**

- After selecting the FI Bond product you will begin the new financial institution bond submission process.
- Provide high level client information to start your quote

03

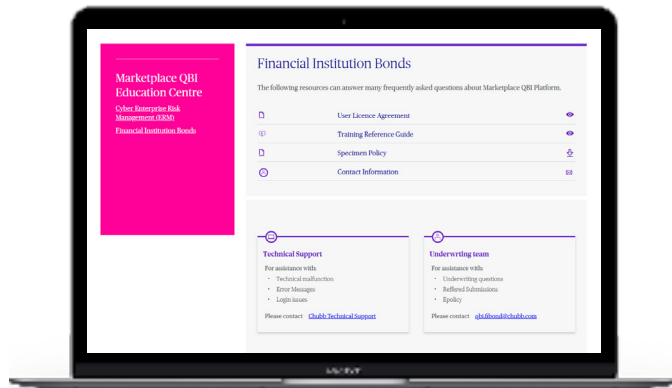
Build your policy



- Provide business class information
- Build multiple quotes to compare and share the options directly with your client
- Review the application and proceed directly to binding.

04

Education Center



- User license agreements
- Training reference guides
- Contact information

Have questions?

Please contact your local Chubb Representative for more information.



Chubb is the marketing name used to refer to subsidiaries of Chubb Limited providing insurance and related services. For a list of these subsidiaries, please visit our website at www.chubb.com. Insurance provided by Chubb Insurance Company of Canada or Chubb Life Insurance Company of Canada (collectively, "Chubb Canada"). All products may not be available in all provinces or territories. This communication contains product summaries only. Coverage is subject to the language of the policies as actually issued. Chubb Canada, Suite 2500, 199 Bay Street, Toronto ON M5L 1E2. (05/24)

