

Creating Quotes - Whole of Life

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This area will allow you to create a comparison whole of life quote.

The screenshot shows a web form titled 'Client Details' and 'Product Options'. The 'Client Details' section includes fields for 'Clients' (with checkboxes for 'Include Life A' and 'Include Life B'), 'Sex' (radio buttons for 'Male' and 'Female'), 'Date of Birth (dd/mm/yyyy)' (text boxes with values '01/01/1981' and '01/02/1981'), 'Smoker?' (radio buttons for 'Yes' and 'No'), and 'Email' (text boxes). The 'Cover Basis' dropdown is set to 'Joint First Life'. The 'Product Options' section includes checkboxes for 'Include Guaranteed Rate Quotes (Products with no investment element)' and 'Include Investment Based Quotes'. The 'Quote Basis' section has radio buttons for 'Premium Based' and 'Benefit Based', with the 'Benefit Based' option selected. Below this, there is a 'Benefit Amount (£)' text box with the value '150000', a 'Premium Frequency' dropdown set to 'Monthly', and a 'Waiver of Premium?' dropdown set to 'No'. At the bottom, there is an 'IFA Ref' text box and a blue 'Get Quote' button.

Client Details

Clients ☒ Include Life A ☒ Include Life B

Life A Life B

Sex ☒ Male ☐ Female ☐ Male ☒ Female

Date of Birth (dd/mm/yyyy) 01/01/1981 01/02/1981

Smoker? ☐ Yes ☒ No ☐ Yes ☒ No

Email

Cover Basis Joint First Life

Product Options

Include Guaranteed Rate Quotes (Products with no investment element) ☒

Include Investment Based Quotes ☐

Quote Basis

☐ Premium Based ☒ Benefit Based

Benefit Amount (£) 150000

Premium Frequency Monthly

Waiver of Premium? No

IFA Ref

Get Quote

Complete the client and product details. Once completed, select **Get Quote**. The comparison quote and illustrations can then be generated in the same way as previously explained for term quotes.