

Creating Quotes - Annuities

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There are two types of annuity quotes available on Webline:

Lifetime will create a more precise quote for the client, as it takes into consideration any medical history and the type of contract the pension fund is coming from and therefore requires more information to be recorded at this quote stage.

Fixed Term will create a quote based on a regular retirement income for a number of years

Purchased Life will create a quote that provides a guaranteed income for life

The screenshot shows the Webline interface for creating a new quote. The top navigation bar includes 'Quote', 'Apply', 'Track', 'Documents', 'Users', 'Settings', and 'Info'. The main content area is titled 'Create a new quote' and has three tabs: 'Protection', 'Annuities', and 'General Insurance'. The 'Annuities' tab is active, showing a list of options: 'Whole Of Life', 'Multi-Benefit', and 'Multi-Policy'. Below this, there are two search boxes: 'Find a previous quote' and 'Find a previous online application'. The footer contains copyright information: 'Copyright © 1995 - 2025 Synaptic Software Limited, part of Fintel. All rights reserved.'

This screenshot shows the Webline interface with the 'Annuities' tab selected. Under the 'Annuities' tab, the options are 'Lifetime', 'Fixed Term', and 'Purchased Life'. The 'Purchased Life' option is highlighted. The rest of the interface, including the search boxes and footer, is identical to the previous screenshot.

