

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

The screenshot shows the Webline user interface. At the top, there is a navigation bar with the Webline logo and a menu with items: Quote, Apply, Track, Documents, Users, Settings, Info. A banner for a free magazine is visible. On the right, user information for '1st Line Vendor Admin Amy Paulsen' and the date 'Tue 4 Feb 2025, 14:41' are shown. The main content area is titled 'Create a new quote' and has three tabs: Protection, Annuities (selected), and General Insurance. Under the Annuities tab, there are three options: Lifetime, Fixed Term, and Find Saved Form. Below this are two search boxes: 'Find a previous quote' and 'Find a previous online application'. The 'Find a previous quote' box has a search field for 'Quote ref or surname' and options to 'List my recent quotes' and 'List all recent quotes'. The 'Find a previous online application' box has a search field for 'Application ref' and options to 'Advanced search' and 'List my recent applications'. On the right side, there is a 'Need help?' section with contact information: 'Call us free on 0808 164 5463', 'Email Synaptic support at support@synaptic.co.uk', and 'Visit our support site Synaptic Knowledgebase'. Below that is a 'News' section with the message 'No current news items to display.' At the bottom left, there is a link 'Show my last logins' and a copyright notice: 'Copyright © 1995 - 2025 Synaptic Software Limited, part of Fintel. All rights reserved.'