

Creating Quotes - Income Protection

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Select health and income protection from the left hand menu. The income protection quote form will be displayed.

Enter the client and product details.

The screenshot displays the 'Income Protection Quotation Form' with a left-hand navigation menu and a main form area. The navigation menu includes links for 'create quotes', 'protection', 'bonds', 'pensions', 'annuities', and 'health', with 'income protection' and 'pmi' selected under 'health'. The main form is divided into 'Client Details' and 'Product Options' sections. The 'Client Details' section includes fields for Sex (Male/Female), Date of Birth (01/09/1950), Smoker status (Yes/No), Occupation (Sales Executive), Annual Earnings (£) (30000), and Email. The 'Product Options' section includes 'Increasing Benefit?' (Yes/No), 'Premium Frequency' (Monthly), 'Monthly Benefit Amount (£)' (800), and a list of deferment periods (4, 8, 13, 26, 52, 56, 104, 112 weeks) with '13 Weeks' selected. It also includes 'Age or Term Driven' (Cease/Term), 'Cease Cover at age' (60), 'Rates' (Guaranteed & Reviewable), and an 'IFA Ref' field. A 'Get Quote' button is at the bottom right. A callout box points to the 'Get Quote' button with the text: 'Once completed, select Get Quote.'

create quotes
protection
bonds
pensions
annuities
> health
 ■ income protection
 ■ pmi

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Income Protection Quotation Form

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Client Details

Sex ☒ Male ☐ Female
Date of Birth (dd/mm/yyyy) 01/09/1950
Smoker? ☐ Yes ☒ No
Occupation Sales Executive
Annual Earnings (£) 30000
Email

Product Options

Increasing Benefit? ☐ Yes ☒ No
Premium Frequency Monthly
Monthly Benefit Amount (£) 800
(Leave blank for maximum benefit based on earnings)
☐ 4 Weeks
☐ 8 Weeks
☒ 13 Weeks
☐ 26 Weeks
☐ 52 Weeks
☐ 56 Weeks
☐ 104 Weeks
☐ 112 Weeks
Please Select which deferment period(s) you wish to be quoted for.
Age or Term Driven ☒ Cease ☐ Term
Age Driven Driven
Cease Cover at age: 60
Rates Guaranteed & Reviewable
IFA Ref
Get Quote

Once completed, select Get Quote.

Insurance Quotation					
Quote Reference = 29739100					
Please click on a premium to see further details and proceed.					
Error and Warning results have notes associated with them. Click on them to view the notes for that result.					
Provider	Product	Benefit	Rates	Deferment Period 13 weeks	eAPPLY
Unum	Essential Ability Cover	£800.00	Reviewable	£9.36	✓
LV=	FPP Online	£800.00	Reviewable	£11.23	✓ +10%
LV=	FPP Online	£800.00	Guaranteed	£12.79	✓ +10%
Scottish Provident	Disability Income Benefit	£800.00	Reviewable	£12.91	
Bright Grey	Protection from Bright Grey	£800.00	Guaranteed	£13.28	
Scottish Provident	Disability Income Benefit	£800.00	Guaranteed	£14.16	
Unum	Executive Income Replacement	£800.00	Reviewable	£15.07	✓
Bupa Individual Protection	Income Protection	£800.00	Reviewable	£15.14	✓
Unum	Income Replacement	£800.00	Reviewable	£15.66	✓
Ageas Protect	Income Protection	£800.00	Guaranteed	£15.85	✓
Legal & General	Low Cost Income Protection Benefit	£800.00	Guaranteed	£16.34	✓
Bupa Individual Protection	Income Protection	£800.00	Guaranteed	£16.46	✓
Friends Provident	Income Protection	£801.67	Guaranteed	£16.95	

The comparison quote will be displayed in premium order.

The **eApply** column will display if the contract can be applied for electronically and if there is enhanced commission.

At the bottom of the comparison table the **Show Printable** and **Get PDF** options will allow you to print and save the comparison table.

Friends Life	Income Protection - Personal	£800.00	Guaranteed	£21.21	✓
Friends Life	Income Protection - Personal	£800.00	Reviewable	£22.02	✓
Legal & General	Income Protection Benefit	£800.00	Guaranteed	£22.27	✓
Aviva Health	Income Protection Solutions		Reviewable	Error	✓

[Show Printable] [Get PDF]

The following products were not included for the reason stated.

Provider	Product Name	Reason
Ageas Protect	Income Protection	Reviewable Rates not available.
Bright Grey	Protection from Bright Grey	Reviewable rates are not supported
Friends Provident	Income Protection	Reviewable rates are not supported
Legal & General	Income Protection Benefit	Reviewable rates not supported.
Unum	Income Replacement	Not quoting Guaranteed rates for Reviewable product

Contracts that have not returned a quote will be displayed with the reason.

to amend your requirements and requote, use the form below

Income Protection Quotation Form

Hide Help Hints Reset Form ?

Client Details

Sex ☒ Male ☐ Female

Date of Birth (dd/mm/yyyy)

A re-quote can be obtained by amending the quote form at the bottom of the screen.

Additional Information for chosen quote			
Quote Status	Successful Quote with warning. See notes.		
Provider	Bright Grey	Product	Protection from Bright Grey
Deferment	13 weeks	Benefit	£800.00
Amount	£13.28	Rates	Guaranteed
Comm	(Comm)	Docs	Docs
Notes	1. Quotation based on a fixed term of 30 years		
Proceed	To proceed with this quote click this button : Next		

Select the premium within the comparison table to display a summary of the quote above the comparison table.

Select **Next** to generate the personalised illustration and product documentation.

Please click on a premium to see further details and proceed.

Error and Warning results have notes associated with them. Click on them to view the notes for that

Provider	Product	Benefit	Rates	Deferment Period	
				13 weeks	APPLY
Unum	Essential Ability Cover	£800.00	Reviewable	£9.36	✓
LV=	FPP Online	£800.00	Reviewable	£11.23	✓ +10%
LV=	FPP Online	£800.00	Guaranteed	£12.79	✓ +10%
Scottish Provident	Disability Income Benefit	£800.00	Reviewable	£12.91	
Bright Grey	Protection from Bright Grey	£800.00	Guaranteed	£13.28	
Scottish Provident	Disability Income Benefit	£800.00	Guaranteed	£14.16	
Unum	Executive Income Replacement	£800.00	Reviewable	£15.07	✓

Income Protection Quotation Form

Hide Help Hints ?

Client Details

Title	<input type="text" value="Mr"/>
Forename	<input type="text" value="Robert"/>
Surname	<input type="text" value="Green"/>
Sex	<input checked="" type="radio"/> Male <input type="radio"/> Female
Date of Birth (dd/mm/yyyy)	<input type="text" value="01/09/1981"/>
Smoker ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Occupation	Sales Executive <input type="button" value="Change"/>
Annual Earnings (£)	<input type="text" value="30000"/>
Email	<input type="text"/>

The comparison does not require the client's name. It will need to be entered at this stage to create the personalised illustration.

Please read the following documents.

Read the [Personalised Illustration](#).
Read the [Key Facts Document](#).

The documentation can be viewed by selecting the blue links.

Click the check boxes below to confirm that you have read the documents

☐ Personalised Illustration
☐ Key Facts Document

Application Options

This provider supports electronic applications. [Click button to apply electronically.](#)

Apply

This button will link you directly to the provider's extranet apply facility where you will be asked to log-on, or be verified by Unipass. Weblene will automatically pre-populate several data fields for you into the application at this state.

To apply by post, click [here](#) to download a pdf application form.

Clicking **Apply** will navigate you through to the Providers website.

You will need to enter the username and password supplied by the provider and the majority of provider's will pre-populate the quote details into the application.

[Data Captutre Form.](#)
[Best Doctors Case Study.](#)
[Health Line.](#)
[CIC Fracture Option.](#)
[Reasons why letter.](#)
[Income Protection Brochure.](#)
[Therapy Benefit.](#)