

# Convertible Term Assurance Quote

Last Modified on 28/02/2024 3:42 pm GMT

To amend details of the Convertible Term Assurance quote, click the pen icon:

The screenshot displays the Synaptic Protection Quote Test interface. At the top, it shows the client's name 'Susanna West', age '42', and smoker status 'Yes'. Below this, the 'Benefits' tab is active, showing a 'Benefit List' with a '+ Add Benefit' button. The main benefit is 'Convertible Term Assurance', which includes a 'Results' button. The quote details are as follows:

Driven By	Premium Frequency	Critical Illness Option
<b>Benefit</b>	<b>Monthly</b>	<b>No</b>
Term	Death Benefit Amount	
<b>10</b>	<b>£100,000.00</b>	

At the bottom of the benefit card, there are four icons: a red trash can, a blue person icon, a grey person icon, and a blue pen icon. A tooltip labeled 'Edit/View Benefit' is positioned over the pen icon.

Note: The system defaults to a ten year term and a £100,000 Death Benefit Amount.

This will load the Quote Details screen.

Complete details of the quote. In this example we will:

- Select 'No' to Critical Illness
- Benefit driven
- Cease at age 52
- Monthly premium
- Guaranteed & Reviewable basis
- £150,000 Death benefit amount
- Waiver of Premium

Once complete. **Save** to refresh quote results:

### Quote Details

Please enter the following details to obtain the quote

#### Product Details

##### Critical Illness Options

Include Critical Illness Cover

Yes  No

##### Driven By

Benefit  Premium

##### Length

Term  Cease Age

\* Cease Age

##### Premium

Premium Frequency

Monthly  Annually

Premium Basis

Guaranteed  Reviewable

##### Benefit Amount

\* Death Benefit Amount

#### Product Features

Please select the features that you would like to have in your product

Increasing Benefit  Renewable Policy  Waiver of Premium

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base Protection Quote Test X More

Search...

Protection Quote Test Edit Delete

Life One Susanna West Age 42 Smoker Yes

#### Benefit List

+ Add Benefit

Convertible Term Assurance	Results
Driven By: Benefit	Premium Frequency: Monthly
Cease Age: 52	Critical Illness Option: No
Death Benefit Amount: £150,000.00	

#### Quick Filter

Clear all

Provider: Filter by Providers Product: Filter by Products Sort by: Premium

Quote Ref. Number: 98416715

Comparison Report Request CIEPERT

Partially Underwritten Quotes (2) Standard Quotes (2) Products Declined to Quote (2) Excluded Quotes (1)

Provider	Product	Benefit Amount	Premium Type	Premium	More Info & Documents	Apply
ZURICH	Life Zurich	£150,000.00	Guaranteed	£23.35	More Info & Documents	Apply
AVIVA	Life Insurance Aviva	£150,000.00	Guaranteed	£24.82	More Info & Documents	Apply

Start