

# Joint Life Quote

Last Modified on 28/02/2024 4:33 pm GMT

This article is a continuation of [Edit/View Benefit](#).

Create a joint life quote by clicking the **Add Client+** button in the Clients tab of a protection quote:

The screenshot shows the Synaptic Protection Quote Test interface. The top navigation bar includes a search bar and various menu items. The main content area is titled "Protection Quote Test" and shows client details: Life One Susanna West, Age 42, Smoker Yes. The "Benefits" tab is active, displaying a "Benefit List" with a "Whole of Life" benefit. The "Quick Filter" section shows filters for Provider (AVIVA), Product (Whole of Life Insurance+), and Sort by (Premium). Below the filters, there are two quote cards: one for AVIVA with a premium of £103.55 and one for ZURICH with a premium of £124.59. Both quotes are for a "Whole of Life" policy with a "Guaranteed" premium type and a benefit amount of £100,000.00.

The screenshot shows the Synaptic Clients tab. The "Clients" section has a "+ Add Client" button. Below it, the "Life One" client details are displayed:

Name	Susanna West		Salary	£45,000.00
DoB	Age	Smoker		
17/09/1982	41	Yes		
Occupation	Accountant			
Email	amy.wood@synaptic.co.uk			
Height	Weight	Waist		
5ft6in	10st5lbs	30in		

The Synaptic logo is visible at the bottom of the client details card.

Select Existing Client or complete details to **Create a New Client**


## Add Client Information

### Client Details

Select Existing Client

Les

 Les West

 Giles Brandreth

First Name

\* Last Name

\* Birthdate

\* Sex

\* Occupation

\* Employment Basis

\* Salary

### Client Medical Details



Client medical details are required to obtain partially underwritten quotes

Cancel

Save

The client details will populate from the Contact record:

## Add Client Information

### Client Details

First Name \* Last Name

Les

West

\* Birthdate

19 Apr 1985



\* Sex

Male



\* Occupation

Baker



\* Employment Basis

Full-time



\* Salary

25,000.00

### Client Medical Details



Client medical details are required to obtain partially underwritten quotes

Smoker Status

Yes

No

Body Mass Index (BMI)

Metric

Imperial

\* Weight

Cancel

Save

### Client Medical Details

**Client medical details are required to obtain partially underwritten quotes**

**Smoker Status**

**Body Mass Index (BMI)**

\*Weight:

\*Height:

Waist:

## Save

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

Client Updated  
Client has been updated successfully

Life One	Age	Smoker	Life Two	Age	Smoker
Susanna West	42	Yes	Les West	39	No

**Clients** | Benefits

**Clients** | + Add Client

**Life One**

Name	Susanna West	Salary	£45,000.00
DoB	17/09/1982	Age	41
Smoker	Yes	Occupation	Accountant
Email	amy.wood@synaptic.co.uk		
Height	5ft6in	Weight	10st5lbs
Waist	30in		

**Life Two**

Name	Les West	Salary	£25,000.00
DoB	19/04/1985	Age	38
Smoker	No	Occupation	

**Quick Filter** | Clear all

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

Quote Ref. Number: 98416928

Comparison Report | Request | CIEXPERT

Partially Underwritten Quotes (2) | Standard Quotes (10) | Excluded Quotes (1)

Provider	Product	Benefit Amount	Premium Type	Premium	More Info & Documents	Apply
AVIVA	Whole of Life Insurance - Aviva	£100,000.00	Guaranteed	£103.55		
ZURICH	Whole of Life Zurich	£100,000.00	Guaranteed	£124.59		

Navigate into the **Benefits** tab:



Protection

## Protection Quote Test

Life One	Age	Smoker	Life Two	Age	Smoker
Susanna West	42	Yes	Les West	39	No

Clients Benefits

Clients

Benefits

+ Add Client

### Life One

Name **Susanna West** Salary **£45,000.00**

DoB **17/09/1982** Age **41** Smoker **Yes**

Occupation **Accountant**

Email **amy.wood@synaptic.co.uk**

Height **5ft6in** Weight **10st5lbs** Waist **30in**



### Life Two

Name **Les West** Salary **£25,000.00**

DoB **19/04/1985** Age **38** Smoker **No**

Quick Filter [Clear all](#)

Provider

Filter by Providers



Partially Underwritten Quotes (2)



Standard

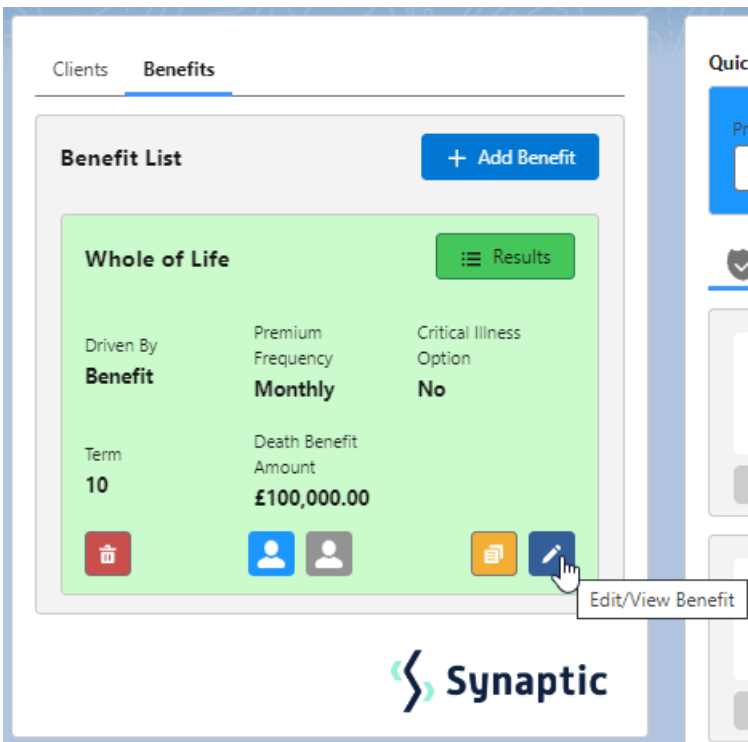


Whole of Life Insurance+  
Aviva



Whole of Life  
Zurich

Click into the benefit through the pen icon:



Click **Second Life**:

Quote Details

Please enter the following details to obtain the quote

**Product Details**

**Quote For**

First Life  **Second Life**

**Driven By**

Benefit  Premium

**Length**

Term  Cease Age

\*Term Length (years) ⓘ

**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  Waiver of Premium

**Quick Commission**

**Save**

### Quote Details

Please enter the following details to obtain the quote

**Product Details**

**Quote For**

First Life
Second Life

**Driven By**

Benefit
Premium

**Length**

Term
Cease Age

\*Term Length (years) ⓘ

**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
Waiver of Premium First Life
Waiver of Premium Second Life

**Quick Commission**

Cancel
Save

The quote results screen will refresh to reflect the joint life quote.

**Protection**

**Protection Quote Test**

Edit Delete

Life One	Age	Smoker	Life Two	Age	Smoker
Susanna West	42	Yes	Les West	39	No

**Benefit List** + Add Benefit

**Whole of Life** Results

Driven By: **Benefit**

Premium Frequency: **Monthly**

Critical Illness Option: **No**

Term: **10**

Death Benefit Amount: **£100,000.00**

Life One

**Quick Filter** Clear all

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

Quote Ref. Number: **98417162**

Comparison Report
Request
CIEXPERT

Partially Underwritten Quotes (2)
Standard Quotes (10)
Excluded Quotes (1)

	<p><b>Whole of Life Insurance+</b></p> <p style="font-size: 0.7em;">Aviva</p>	<p>Benefit Amount</p> <p><b>£100,000.00</b></p>	<p>Premium Type</p> <p><b>Guaranteed</b></p>	<p>Premium</p> <p><b>£123.15</b></p>	<p style="font-size: 0.7em;">More Info &amp; Documents</p> <p style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">Apply</p>
	<p><b>Whole of Life</b></p> <p style="font-size: 0.7em;">Zurich</p>	<p>Benefit Amount</p> <p><b>£100,000.00</b></p>	<p>Premium Type</p> <p><b>Guaranteed</b></p>	<p>Premium</p> <p><b>£137.43</b></p>	<p style="font-size: 0.7em;">More Info &amp; Documents</p> <p style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">Apply</p>

You can view joint life in the benefit tile:

**Benefit List**

+ Add Benefit

**Whole of Life**

☰ Results

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

