

Joint Life Quote

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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. At the top, there is a search bar and navigation tabs including Synaptic Pathways, Home, Paraplanner Access Centre, Contacts, Research, Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, and Protection Quote Test. The main header displays 'Protection Quote Test' with 'Edit' and 'Delete' buttons. Below the header, client details are shown: Life One Susanna West, Age 42, Smoker Yes. The interface is divided into 'Clients' and 'Benefits' tabs. The 'Benefits' tab is active, showing a 'Benefit List' with a '+ Add Benefit' button. A 'Quick Filter' section allows filtering by Provider (Filter by Providers), Product (Filter by Products), and Sort by (Premium). A 'Quote Ref. Number: 98416928' is displayed with buttons for 'Comparison Report', 'Request', and 'CIEXPERT'. The main area shows a list of quotes under 'Partially Underwritten Quotes (2)', 'Standard Quotes (10)', and 'Excluded Quotes (1)'. Two quotes are visible: AVIVA Whole of Life Insurance+ with a Benefit Amount of £100,000.00 and Premium of £103.55; and ZURICH Whole of Life Zurich with a Benefit Amount of £100,000.00 and Premium of £124.59. Each quote has 'More Info & Documents' and 'Apply' buttons.

The screenshot shows the Synaptic Clients tab. At the top, there are 'Clients' and 'Benefits' tabs. The 'Clients' tab is active, showing a '+ Add Client' button. Below this, the client details for 'Life One' are displayed in a form. The details include: 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, and Waist 30in. There is an edit icon at the bottom right of the client details form. The Synaptic logo is at the bottom.

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


Add Client Information

Client Details

Select Existing Client



 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

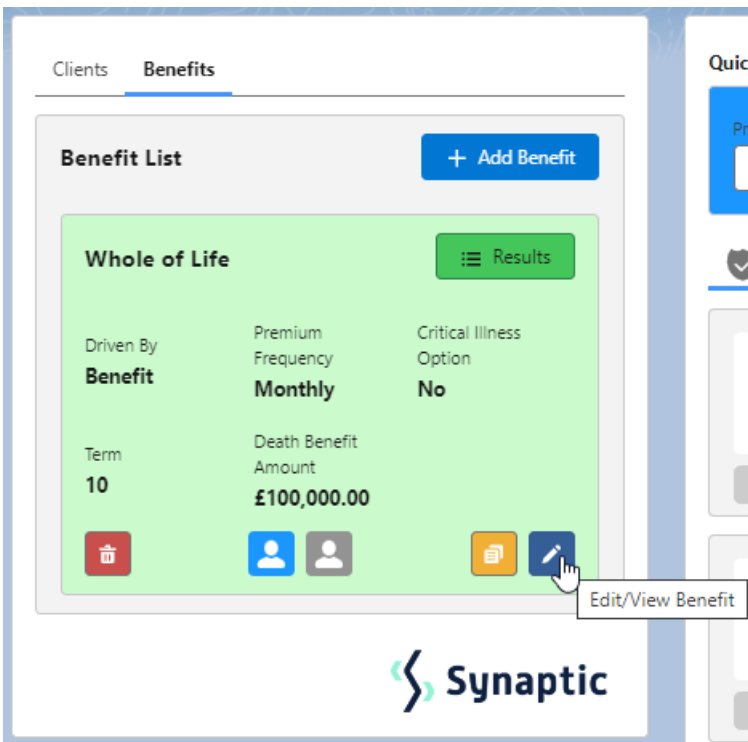


Whole of Life Insurance+
Aviva



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

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

Edit Delete

Clients **Benefits**

Benefit List + Add Benefit

Whole of Life Results

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

Life One
Life Two

Quick Filter Clear all

ProvidersProductsSort by

Filter by ProvidersFilter by ProductsPremium

Quote Ref. Number: 98417162
Comparison Report
Request
CIEXPERT

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

 AVIVA	Whole of Life Insurance+ <small>Aviva</small>	Benefit Amount £100,000.00	Premium Type Guaranteed	Premium £123.15	<small>More Info & Documents</small> Apply
 ZURICH	Whole of Life <small>Zurich</small>	Benefit Amount £100,000.00	Premium Type Guaranteed	Premium £137.43	<small>More Info & Documents</small> Apply

You can view joint life in the benefit tile:

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	

