

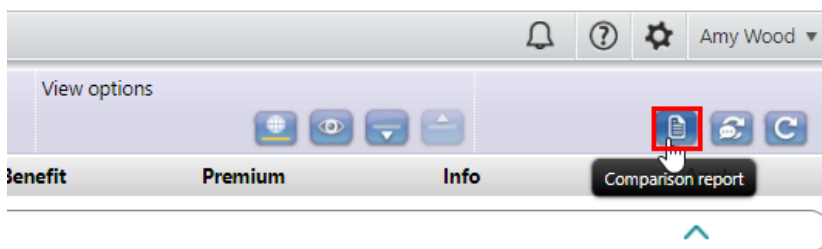
Evidence of Research

Last Modified on 08/05/2024 9:39 am BST

Once a piece of research has been conducted, there will be a need for this to be evidenced. Keeping a copy of the Illustration will evidence the solution chosen, but not why it has been chosen.

A report can be printed once a piece of research has been completed to put onto a client file to evidence why that particular product has been chosen. This will show all the products that quoted and those that didn't. For those that didn't the reason(s) why will be displayed.

There is a Comparison Report button on the tool bar that will do this:










A report will then be produced in a new window giving information about the person, what they wanted and a list of products which could and could not quote.

The following report is for the Standalone option:



COMPARISON REPORT

Partially underwritten quotes

Providers	Product	Benefit	CIC/TPD	Rates	Partially Underwritten Premium	Standard Premium	Initial Commission	Renewal Commission	Notes
 Aviva	Life Insurance+	£50,000 Life £50,000 Life or CI	Comprehensive + TPD (own occ)	R	£1,200	£1,200	£1,200	£1,200	AN
 Aviva	Life Insurance+	£50,000 Life £50,000 Life or CI	Comprehensive + TPD (own occ)	G	£1,200	£1,200	£1,200	£1,200	U
 HSBC	HSBC Life	HSBC Life and Critical Illness	TPD (Activities Of Daily Living)	G	£1,200	£1,200	£1,200	£1,200	V
 ZURICH	Zurich	Personal Protection	Comprehensive + TPD (own occ)	G	£1,200	£1,200	£1,200	£1,200	AA
 ZURICH	Zurich	Personal Protection with child	Comprehensive + TPD (own occ)	G	£1,200	£1,200	£1,200	£1,200	B
 Aviva	Life Insurance+ Upgrade/No Child upgrade	£50,000 Life £50,000 Life or CI	Comprehensive + TPD (own occ)	R	£1,200	£1,200	£1,200	£1,200	AH
 ZURICH	Zurich	Personal Protection Select	Comprehensive + TPD (own occ)	G	£1,200	£1,200	£1,200	£1,200	I

Quote reference: 96948076

Quote date & time: 10/12/2021 11:21:06

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The following report is for the Multi Benefit option:

Comparison Report



Multi-Benefit

Firm Webline Admin Adviser Amy A Wood Basis of sale Whole of Market Quote date and time 02/06/2021 11:48 Quote Reference 96374995

Client details

Name Test Client
Sex Female
Date of Birth 01/01/1970
Smoker No
Occupation Baker
Height 5 ft 6 in
Weight 11 st
Waist 30 in

Product details

Premium frequency Monthly
Benefits
Benefit amount ID Description
£100,000 1 Term Protection - Life cover for First Life for 10 years.
£1,000 2 Income Protection - First Life until age 60.
£10,000 3 Family Income Protection - Life cover for First Life for 10 years.
4 Waiver on First Life.

Provider	Product	Total premium	Partially u/w	Notes
Legal & General	Multi Discount (1 year)	£46.40		A
	Benefits			
	ID Type	Description	Benefit amount	Premium
	1 Term Protection	Life cover	£100,000	£16.68
	2 Income Protection	Disability	£1,000 pcm	£21.32
	3 Family Income Benefit	Life cover	£833 pcm	£7.87
	4 Waiver of Premium	Disability		£0.53
Provider	Product	Total premium	Partially u/w	Notes
Legal & General	Multi Discount (2 year)	£50.66		B
	Benefits			
	ID Type	Description	Benefit amount	Premium

If commission information is hidden on the quotes page, it will not print on this report.
