

Creating Quotes - Income Protection

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

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

Enter the client and product details.

create quotes
protection
bonds
pensions
annuities
> health
income protection
pml

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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

Cease Cover at age: 60

Rates

IFA Ref

Guaranteed & Reviewable

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.
	Executive Income Replacement	Not quoting Guaranteed rates for Reviewable product

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

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

To amend your requirements and requote, use the form below.

Income Protection Quotation Form

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Client Details

Sex ☒ Male ☐ Female

Date of Birth (dd/mm/yyyy)

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		

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.

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.

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

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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 Change
Annual Earnings (£)	<input type="text" value="30000"/>
Email	<input type="text"/>

[Proceed](#)

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](#).

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. Weblin 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.

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

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.