


# Creating Quotes - Term Assurance

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This will allow you to create a straightforward comparison term quote on level, decreasing or increasing basis for life and critical illness.

The screenshot shows a web form for creating term assurance quotes. It is divided into two main sections: 'Client Details' and 'Product Options'.  
**Client Details:** Includes fields for 'Clients' (with checkboxes for 'Include Life A' and 'Include Life B'), 'Sex' (radio buttons for 'Male' and 'Female'), 'Date of Birth (dd/mm/yyyy)' (text input with '02/09/1981'), 'Smoker?' (radio buttons for 'Yes' and 'No'), 'Occupation' (text input with 'Sales Executive' and a 'Change' button), and 'Email' (text input).  
**Product Options:** Includes 'Product Type' (radio buttons for 'Premium Driven' and 'Benefit Driven'), 'Benefit Type' (dropdown menu with 'Death Benefit Only'), 'Death Benefit Amount(£)' (text input with '200000'), 'Do you want a Renewable policy?' (checkbox), 'Term' (text input with '20' and 'Years'), 'Premium Frequency' (dropdown menu with 'Monthly'), 'Increasing Benefit?' (radio buttons for 'Yes' and 'No'), 'Waiver of Premium?' (dropdown menu with 'No'), 'Rates' (dropdown menu with 'Guaranteed & Reviewable'), 'How did you hear about us?' (dropdown menu with 'Please Select'), and 'IFA Ref' (text input). At the bottom, there is a 'Get Quote' button and a 'Comm' label.

If 'quick commission' has been enabled in the **settings** area the **Comm** button will allow you to sacrifice commission on this particular quote. Once completed select **Get Quote**.

The quote forms are user friendly and as easy to understand as possible, but if there is anything you don't understand, simply click on .

In a few seconds Weblines obtains quotes from the providers and displays them by default with the cheapest premium at the top, but this can be changed by clicking any of the column headings as displayed below.

Weblines will give you a quote reference which can be used to retrieve the quote at a later date.

### Insurance Quotation

Quote Reference = 27971076

The comparison table will clearly display the contracts that can be applied for electronically.

The table below shows the premium based on the data you have supplied. Please click on the **Next** button adjacent to the quotation you prefer.

Docs	Provider	Product	Benefit	Premium		APPLY	Notes	Comm	Select
				Rates	Amount				
Docs	Aviva	Term Assurance	£200,000.00	Guaranteed	£8.00		(Notes)	(Comm)	<a href="#">Next</a>
Docs	Aviva	Term Assurance (Electronic)	£200,000.00	Guaranteed	£8.00	✓ +10%	(Notes)	(Comm)	<a href="#">Next</a>
Docs	PruProtect	PruProtect Essentials Plan	£225,601.00	Guaranteed	£8.00	✓	(Notes)	(Comm)	<a href="#">Next</a>
Docs	PruProtect	PruProtect Essentials Plan	£225,601.00	Reviewable	£8.00	✓	(Notes)	(Comm)	<a href="#">Next</a>
Docs	Zurich	Level Protection Plan (Gtd) - Paper	£200,000.00	Guaranteed	£8.03		(Notes)	(Comm)	<a href="#">Next</a>
Docs	Zurich	Level Protection Plan (Gtd) - Electronic	£200,000.00	Guaranteed	£8.03	✓	(Notes)	(Comm)	<a href="#">Next</a>
Docs	Fortis	Term Protection	£200,000.00	Guaranteed	£8.06	✓		(Comm)	<a href="#">Next</a>
Docs	LV=	FPP Online (with free Healthy Steps)	£200,000.00	Guaranteed	£8.14	✓ +10%		(Comm)	<a href="#">Next</a>
Docs	Aviva	Life Insurance (Electronic)	£200,000.00	Guaranteed	£8.18	✓		(Comm)	<a href="#">Next</a>
Docs	AXA	Term Protection - Personal	£200,000.00	Guaranteed	£8.40	✓ +10%	(Notes)	(Comm)	<a href="#">Next</a>
Docs	Scottish Provident	Self Assurance Term Personal	£200,000.00	Guaranteed	£8.72	✓ +10%		(Comm)	<a href="#">Next</a>
Docs	Scottish Provident	Self Assurance Term Personal	£200,000.00	Reviewable	£8.72	✓ +10%		(Comm)	<a href="#">Next</a>
Docs	AEGON Scottish Equitable	Personal Protection	£200,000.00	Guaranteed	£8.98	✓ +10%	(Notes)	(Comm)	<a href="#">Next</a>

Docs	Legal & General	Mortgage Level Term - Electronic	£200,000.00	Guaranteed	£13.60		(Notes)	(Comm)	<a href="#">Next</a>
Docs	Friends Provident	Term Assurance - Life	£200,000.00	Guaranteed			Error (Notes)		
Docs	Friends Provident	eSelect	£200,000.00	Guaranteed			Error (Notes)		
Docs	Legal & General	Term	£200,000.00	Guaranteed			Error (Notes)		

If any of the providers returned an error, you can view the notes by clicking on the **(Notes)** link by the error. It will state why they have not quoted.

Select **(Show Printable)** or **(Get PDF)** to print and save a copy of the comparison.

Docs	Aviva	Term Assurance (Electronic)	£200,000.00	Guaranteed	£8.00	✓ +10%	(Notes)	(Comm)	<a href="#">Next</a>
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The following products were not included for the reason stated.

Provider	Product Name	Reason
AEGON Scottish Equitable	Personal Protection	Reviewable Rates not supported.
Ageas Protect	Term Protection	Reviewable Rates not available.
Aviva	Term Assurance	Reviewable rates unsupported for death only quotes
Bright Grey	Protection from Bright Grey	Reviewable rates unsupported for death only quotes
Bupa Individual Protection	Life Level Term Assurance	Reviewable Rates not supported for death only quotes.
Bupa Individual Protection	Life Level Term Assurance	Reviewable Rates not supported for Death Only quotes.
Bupa Individual Protection	Life Level Term Assurance	Reviewable rates unsupported for death only quotes
Bupa Individual Protection	Life Level Term Assurance	Reviewable rates unsupported for death only quotes
Bupa Individual Protection	Life Level Term Assurance	Reviewable Rates not supported for death only quotes.
Bupa Individual Protection	Life Level Term Assurance	Reviewable Rates not supported.
Zurich	Level Protection Plan (Rev) - Paper	Reviewable rates not supported for Death only quotes.

If any of the provider's contracts were not included, they are displayed in a separate table with the reason

Skandia Strandia Protect Reviewable Rates not supported.  
Zurich Level Protection Plan (Rev) - Paper Reviewable rates not supported for Death only quotes.

If you wish to amend your requirements and requote, use the form below.

### Protection Quotation Form

[Reset Form](#)

#### Client Details

Include Life A  Include Life B  
**Life A** **Life B**  
 Sex  Male  Female  Male  Female  
 Date of Birth (dd/mm/yyyy) 02/09/1981  
 Smoker?  Yes  No  Yes  No  
 Occupation Sales Executive [Change](#)  
 Email

#### Product Options

Product Type Term  
 Premium Driven  Benefit Driven  
 Benefit Type Death Benefit Only

A re-quote can be easily generated by scrolling down below the comparison table and amending the quote form. A new comparison quote will be generated with a new reference so it can once again be retrieved at a later date.

### Insurance Quotation

Quote Reference = 27971076

The table below shows the premium based on the data you have supplied. Please click on the **Next** button adjacent to the quotation you prefer.

Docs	Provider	Product	Comm	Select
Docs	Aviva	Term Assurance	(Comm)	<a href="#">Next</a>
Docs	Aviva	Term Assurance (Electronic)	(Comm)	<a href="#">Next</a>
Docs	PruProtect	PruProtect Essentials Plan	(Comm)	<a href="#">Next</a>
Docs	PruProtect	PruProtect Essentials Plan	(Comm)	<a href="#">Next</a>
Docs	Zurich	Level Protection Plan (Gtd) - Paper	(Comm)	<a href="#">Next</a>
Docs	Zurich	Level Protection Plan (Gtd) - Elec	(Comm)	<a href="#">Next</a>
Docs	Fortis	Term Protection	(Comm)	<a href="#">Next</a>
Docs	LV=	FPP Online (with free Healthy Steps)	(Comm)	<a href="#">Next</a>
Docs	Aviva	Life Insurance (Electronic)	£200,000.00 Guaranteed £8.18 ✓	(Comm) <a href="#">Next</a>
Docs	AXA	Term Protection - Personal	£200,000.00 Guaranteed £8.40 ✓ +10% (Notes)	(Comm) <a href="#">Next</a>
Docs	Scottish Provident	Self Assurance Term Personal	£200,000.00 Guaranteed £8.72 ✓ +10%	(Comm) <a href="#">Next</a>
Docs	Scottish Provident	Self Assurance Term Personal	£200,000.00 Reviewable £8.72 ✓ +10%	(Comm) <a href="#">Next</a>
Docs	AEGON	Scottish Equitable Personal Protection	£200,000.00 Guaranteed £8.98 ✓ +10% (Notes)	(Comm) <a href="#">Next</a>

A single illustration can be generated for the client by selecting **Next** for the chosen contract.

You will be prompted to add the clients name so that a personalised Illustration can be created.

Once the illustration has been received, you will be given the option to download the personalised Illustration for your client and other relevant documentation from the provider.

Docs	Provider	Product	Benefit	CIC/TPD	Rates	Amount	e <sub>APPLY</sub>	Notes	Comm
Docs	Bupa Individual Protection	CIC Term with Life (Level)	£150,000.00	CIC + TPD (own occ)	Reviewable	£28.70	✓ +10%	(Notes)	(Comm)

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Click this link to return to the [comparative table](#) and obtain another illustration

**Please read the following documents**

Read the [Personalised Illustration](#)  
Read the [Key Facts](#).

**Click the check boxes below to confirm that you have read the documents**

Personalised Illustration  
 Key Facts Document

**Application Option**

This provider supports electronic applications. Click [here](#)

**Apply** This button will link you directly to the provider's external website. You will be asked to log-on, or be verified by Unipass. We will pre-populate the majority of data fields for you into the application at this state.

To apply by post, click [here](#) to download a pdf application form.

Select the blue link to display the

Selecting **Apply** will navigate you through to the provider's 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.