

Purchased Life Annuity

25/03/2025 3:33 pm GMT

Create a Purchased Life Annuity through the Annuity tab on the Homepage:

The screenshot shows the Webline homepage. At the top, there is a navigation bar with 'Quote', 'Track', 'Users', 'Settings', 'Admin', 'Sys Admin', and 'Info'. A purple banner reads 'If you require any assistance, please contact our support team' with 'Email support@synaptic.co.uk or call 0800 164 5463'. The 'UAT' logo and 'SYNAPTIC WEBLINE' are also visible. On the right, it says 'Synaptic Webline Admin Amy Wood' and 'Tue 25 Mar 2025, 15:20'. The main content area is titled 'Create a new quote' and has three tabs: 'Protection', 'Annuities', and 'General Insurance'. Under 'Annuities', there are options for 'Lifetime', 'Fixed Term', and 'Purchased Life' (which is highlighted with a mouse cursor). There is also a 'Find Saved Form' option. Below this are two search boxes: 'Find a previous quote' and 'Find a previous online application'. A 'Need help?' sidebar on the right offers contact options: 'Call us free on 0800 164 5463', 'Email Synaptic support at support@synaptic.co.uk', and 'Visit our support site Synaptic Knowledgebase'. A 'News' section at the bottom right says 'No current news items to display.' The footer contains the copyright notice: 'Copyright © 1995 - 2025 Synaptic Software Limited, part of Fintal. All rights reserved.'

<https://uat.webline.co.uk/WeblineNet/QuoteForms/AnnuityQuote.aspx?Type=PLA>

This will open the quote page:

The screenshot shows the 'Purchased Life Quote Form'. It is divided into several sections: 'Client Details', 'Product Selection', 'Benefit Details', and 'Payment Details'. The 'Client Details' section includes fields for 'Title', 'Forename', 'Surname', 'Gender' (Male/Female), 'Date of Birth' (dd/mm/yyyy), and 'Postcode'. There is also an 'Include Life B' checkbox. The 'Product Selection' section includes 'Product Type', 'Cover Basis' (Single Life), 'Quote Basis' (Fund/Income), and 'Benefit Details' (Escalation Type, Protection Basis, Guaranteed Element, Capital Protection, Value Protection %). The 'Payment Details' section includes 'Payment Start Date'. The form is styled with a grey and white color scheme and includes red asterisks for required fields.

Complete details of the quote:

Purchased Life Quote Form

Client Details

Clients	Life A	<input type="checkbox"/> Include Life B
Title	<input type="text" value="Mr"/>	<input type="text"/>
Forename	<input type="text" value="Test"/>	<input type="text"/>
Surname	<input type="text" value="Client"/>	<input type="text"/>
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Male <input type="radio"/> Female
Date of Birth	<input type="text" value="01/01/1955"/>	<input type="text" value="dd/mm/yyyy"/>
Postcode	<input type="text" value="HD1 6NA"/>	<input type="text"/>

Product Selection

Product Type

Cover Basis	<input type="text" value="Single Life"/>
Quote Basis	<input checked="" type="radio"/> Fund <input type="radio"/> Income
Total Fund Amount	<input type="text" value="200000"/>

Benefit Details

Escalation Type	<input type="text" value="Level"/>
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Protection Basis

Protection Basis	<input type="text" value="Guarantee Period"/>
Guaranteed Element	
Guaranteed For	Years: <input type="text" value="10"/>
Capital Protection	
Value Protection %	<input type="text"/>

Payment Details

Payment Start Date

Commencing Date

Payment Frequency

Payment Type

IFA Details

IFA Reference

Charging

Advice basis

Advised Sale please select type of advice given

Non-Advised Sale please select sale category

Type of Remuneration

Commission
 Based on system settings Modify quote commission

Adviser charging