

Fixed Term Annuity Quote

26/03/2025 3:22 pm GMT

Create an **Fixed Term Annuity** quote through the **Annuity** tab on the Homepage:

The screenshot shows the Webline homepage with a navigation bar containing 'Quote', 'Track', 'Users', 'Settings', 'Admin', 'Sys Admin', and 'Info'. A 'Cost & Charge Comparison' banner is visible. The main content area is titled 'Create a new quote' and features three tabs: 'Protection', 'Annuities', and 'General Insurance'. Under the 'Annuities' tab, there are links for 'Lifetime', 'Fixed Term', and 'Purchase of Life', along with a 'Find Saved Form' link. A 'Product glossary' link is also present. Below this, there are two search sections: 'Find a previous quote' with a search box for 'Quote ref or surname' and 'Find a previous online application' with a search box for 'Application ref'. Both sections include links for 'List my recent quotes/applications' and 'Show my last logins'.

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This screenshot is similar to the previous one but includes user information in the top right corner: 'Webline Admin', 'Amy Paulson', and 'Wed 26 Mar 2025, 15:0'. The 'Synaptic Website' and 'Log out' links are also visible in the bottom right.

Fixed Term Form

Client Details

Title *

Forename *

Surname *

Gender Male Female *

Date of Birth *

Is a smoker Yes No *

Post Code *

Does the client(s) give consent to their data being shared with annuity providers for the purpose of producing a whole of market comparison?
 Yes No *

Annuity Details

Pension type *

Total Pension Fund Amount *

Income choice *

Required Annual Income *

Tax Free Cash *

Term Years Months *

Protection Basis

Protection Basis *

Guaranteed Element

Guaranteed For Years: Months:

Value Protection

Complete the details of the quote.

If your client does not consent to their data being shared with Providers, select No.

Fixed Term Form

Client Details

Title	<input type="text" value="Mr"/>
Forename	<input type="text" value="Test"/>
Surname	<input type="text" value="Client"/>
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female
Date of Birth	<input type="text" value="01/01/1955"/>
Is a smoker	<input type="radio"/> Yes <input checked="" type="radio"/> No
Post Code	<input type="text" value="HD1 6NA"/>

Does the client(s) give consent to their data being shared with annuity providers for the purpose of producing a whole of market comparison?

Yes No

Annuity Details

Pension type	<input type="text" value="Please choose"/>	*	
Total Pension Fund Amount	<input type="text"/>	*	
Income choice	<input type="text" value="Specific Amount"/>		
Required Annual Income	<input type="text"/>	*	
Tax Free Cash	<input type="text"/>	*	
Term	<input type="text"/>	*	
	Years	Months	*
			*
Protection Basis			
Protection Basis	<input type="text" value="Please choose"/>	*	
Guaranteed Element			
Guaranteed For	Years: <input type="text"/>	Months: <input type="text"/>	
Value Protection			

Add details of the annuity:

← Annuity Details

Pension type	Individual Personal Pension ▼	
Total Pension Fund Amount	250000	
Income choice	Specific Amount ▼	
Required Annual Income	20000	
Tax Free Cash	0	
Term	10 Years	5 Months
Protection Basis		
Protection Basis	None ▼	
Guaranteed Element		
Guaranteed For	Years: <input type="text"/>	Months: <input type="text"/>
Value Protection		
Value Protection Percentage	<input type="text"/>	
Escalation	3% ▼	
Commencing date	01/04/2025	
Payment frequency	Monthly ▼	
Payment type	In Advance ▼	

Tax Free Allowance

If the client is entitled to more than 25% tax free cash from an annuity provider, please provide details below:

Are you entitled to more than 25% Tax free Cash with your current provider Yes No

Guaranteed Annuity Rate (GAR)

If the client is entitled to a Guaranteed Annuity Rate (GAR) from an annuity provider, please provide details below:

Is the Client entitled to a GAR? Yes No

Guaranteed Minimum Pension (GMP)

If the client is entitled to a Guaranteed Minimum Pension (GMP) and/or Section 9(2B) rights, please provide details below:

Client is Entitled to GMP Yes No

Section 9(2B) Rights

Add Charging details and **Submit**:

Guaranteed Minimum Pension (GMP)

If the client is entitled to a Guaranteed Minimum Pension (GMP) and/or Section 9(2B) rights, please provide details below:

Client is Entitled to GMP Yes No

Section 9(2B) Rights

Client is Entitled to Section 9 (2B) Rights Yes No

Charging

Advice basis

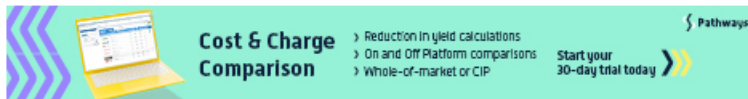
- Advised Sale please select type of advice given
- Non-Advised Sale please select sale category

Type of Remuneration

- Commission
- Based on system settings Modify quote commission
- Adviser charging

Submit

This will generate a quote reference:



Cost & Charge Comparison

- › Reduction in yield calculations
- › On and Off Platform comparisons
- › Whole-of-market or CIP

Start your 30-day trial today >>>

Pathways

Processing your quotation.

All quotations are supplied by the participating providers.

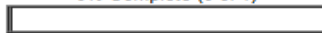
Your quotation reference is

98865771

Thank you for using our service. We are now connecting to the providers and the results of your quotation request will be displayed in a few seconds.

Quotation Progress

0% Complete (0 of 1)



Stop Waiting



