

LifeQuote Quick Start Guide

1 Go to www.lifequote.co.uk
Login with your unique User Name and Password

Existing Advisers

User Name

Password

Remember me [Forgot password?](#)

Your user name or ID will be the same as your Case Tracking details. If you need help with your login please call our helpline on 01243 791199.

For a 28 day free trial of the LifeQuote Portal register below.

2 Select to quote for a new client or recall an existing client

New Clients

Please select the 'Quote' button if you wish to quote for a new client.

Existing Clients

Listed below are your most recent clients. Click on the 'All Clients' button to view all your previous clients. Then click on the 'Load' button to retrieve that clients details.

Last Accessed	Client	OS Email Apps	Load
26/06/15 10:08:09	Mr Luke Barber & Miss Elizabeth-Ann Pickard	2	<input type="button" value="Load"/>



3 Enter your client(s) details

Client Details for all Quotes

Applicant 1		Applicant 2	
Title: Mr.	<input type="text"/>	Title: Miss.	<input type="text"/>
First name: Luke	<input type="text"/>	First name: Elizabeth-Ann	<input type="text"/>
Last name: Barber	<input type="text"/>	Last name: Pickard	<input type="text"/>
Gender: Male	<input type="text"/>	Gender: Female	<input type="text"/>
DOB (dd/mm/yyyy): 07/07/1986	ANB: 29	DOB (dd/mm/yyyy): 03/01/1981	ANB: 35
Smoker Status: Never Smoked	<input type="text"/>	Smoker Status: Never Smoked	<input type="text"/>



4 From the right hand side of the screen, select your quote requirements, expanding and collapsing the bars



- MultiQuote**

A range of Term and Critical Illness products, up to 24 quotes in one request
- Family Income Benefits**

Individual Family Income Benefit Quotes
- Custom Multi Benefit**

Create bespoke multi benefit plans
- Multi Benefit (Intelligent Protection)**

Tailoring multi benefit plans through needs prioritisation, also providing an automated suitability report.
- Business Protection**

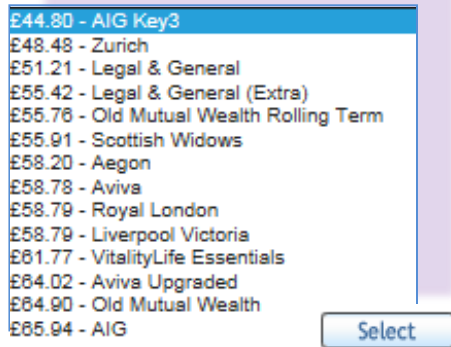
Provides quotes for Key Person, Business Loan, Shareholder, Partner cover and Relevant Life
- Income Protection**

A range of full and short term Income Protection plans
- Whole of Life**

Quote for Whole of Life
- Submit Alternative Quote**

Giving Advisers the ability to apply for any quote, even if quoted directly with an insurer or on another portal.

- 5 To view the full illustration, key facts and to submit the application choose the insurer and press 'Select'



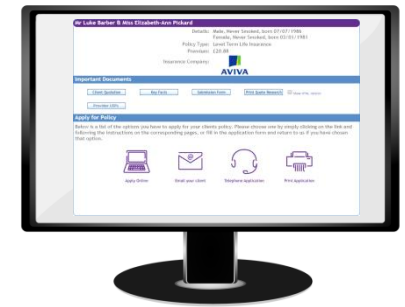
- 6 The detailed results screen enables you to view and download the:

- ▶ Illustration
- ▶ Commission Terms
- ▶ Key Facts
- ▶ Quote research for your file



- 7 To apply, simply choose one of the following options:

- ▶ Apply Online – to complete the insurers questions and submit to LifeQuote
- ▶ Email Your Client – a link for your client to complete an application safely and securely online
- ▶ Telephone Application – arrange a call for LifeQuote to complete the application with the client over the phone
- ▶ Print Application – the traditional paper form



Apply Online



Email your client



Telephone Application



Print Application

- 8 See links on your LifeQuote homepage to access:

- ▶ Live case tracking of all your protection business
- ▶ Insurer comparisons and underwriting limits
- ▶ Decision in Principle pre-underwriting tool

