LifeQuote

Customise your client contact preferences

Did you know you are able to tailor your client contact preferences to meet your business needs?

We have a range of options available for contacting your clients plus how we deal with your acceptance terms and start dates. If you are unsure of your contact preferences or would like to make some changes then please contact your Case Manager who can do this for you.

Unsure of who your Case Manager is? Click here to send us an email and they'll come back to you.

Contact Preferences Available

Client Contact

There are 5 options you can choose as to how you would like us to manage contact with your clients prior to Acceptance Terms which are managed differently (see below).

1. **No Preference** – We will contact your client by phone, email, text or letter to gather all information required.
2. **No by Phone** – We will only contact your client by email, text or letter and not phone them.
3. **Never** – We will never contact your client directly.
4. **Admin Never** – We will only contact your client pre-submission to the insurer, all following communication will come through you.
5. **FT Never** – We will only contact your clients once the application has been submitted to the insurer. During the submission process all contact will be through you.

Acceptance Terms

There are 4 options you can choose as to how you would like us to deal with acceptance terms. These include:

1. **No Preference –** We will contact your client directly to discuss the terms before sending you a copy.
2. **Only on Standard Terms –** If the acceptance terms are 'standard' we will contact your client directly to discuss the terms before sending you a copy. Non-Standard terms will be sent directly to you.
3. **Never –** We will always send the acceptance terms directly to you without contacting your client. As standard we would post a copy of the acceptance terms to your client but you can opt out of this.

Start Dates

There are 3 options you can choose as to how you would like us to deal with start dates. These include:

1. **No Preference –** We will chase you and your clients for a start date bi-weekly.
2. **Only on Standard Terms –** We will only chase your client on standard terms bi-weekly. For Non-Standard terms we will chase you.

3. **Never** – We will chase only you monthly.

For further information please contact the Adviser Support team on 01243 791199.

To view our previous updates please click here.

Best regards,
LifeQuote Team
April 2019