

LifeQuote and Iress Exchange user guide

LifeQuote’s application and administration services have been integrated into The Exchange allowing advisers to still use their preferred protection portal and still benefit from LifeQuote’s application service.

This document details how to hand off an application via The Exchange to LifeQuote for processing.

1. First select the quote from The Exchange which you would like to process with LifeQuote.

Provider / Product	Premium (p.m.)	Commission (initial)	Benefits included	Notes
Providers returning 4 out of 4 standard rate benefits				
 Personal Menu Plan	£25.42	£786.12	(1) MP-F (2) TA-F (3) MP-F (4) TA-F	V N APPLY LifeQuote

2. Select the ‘LifeQuote’ option from the drop down menu in order to place the case with LifeQuote.

If you haven’t registered for the administration service, you will be presented with a message making you aware. You will need to contact the team at LifeQuote on **01243 791199** in order to be set up. Please note this may require an agency application to be completed and permission from the firm principal granted.

For larger networks please contact us as we may already have an arrangement with you.

3. Once you have selected to apply you will be redirected to the LifeQuote application screens. Some of the information will pre-populate from The Exchange.
 - » Complete basic clients information including address, email address and phone number. You will also be asked to provide confirmation that you have consent from your clients to share their details with LifeQuote.

Policy Details

Life Insurance Company: The Exeter Income First Age Costed	Amount of cover: £1000 pm	Monthly Premium : £16.71
Type of Policy: Income Protection	Term of Policy: 30 Years	
Benefit period: Full Term	Occupation Definition: Own occupation	Deferred Period: 8 Weeks

Your details

Please enter your email address to receive the important documents, confirmation of your client's tele-underwriting appointment and a link to re-book the appointment if necessary.

Your client ref:

[Your Quotation](#)
[The key features document](#)
[Commission Terms](#)

We will automatically email these documents to the address supplied.

Client Details

Applicant 1

Sex: Male	*Marital status: <input type="text"/>	*Postcode: <input type="text"/>
Date of Birth: 01/01/1985	*Occupation: <input type="text"/>	<input type="button" value="Get Address"/>
Smoker: Never Smoked	*Employment status: <input type="text"/>	*Address line 1: <input type="text"/>
*Title: <input type="text"/>	Evening phone: <input type="text"/>	Address line 2: <input type="text"/>
*Forename(s): <input type="text"/>	Daytime phone: <input type="text"/>	*Postal Town: <input type="text"/>
*Surname: <input type="text"/>	Mobile phone: <input type="text"/>	*County: <input type="text"/>
*Email Address: <input type="text"/>		

- » You can confirm add on features or product alterations via the screen below under 'please confirm any special requirements'. E.g. you could ask LifeQuote to add Global Treatment.

*Is this Policy to cover a Mortgage?
 No

*Was this sale advised?
 N

Please confirm any special requirements:

255 character(s) left

*I have my customer's consent to share this data and for you to process the application.
 N

Next

- » Complete the clients direct debit details. Some insurers will require these in order to set up the application.

LifeQuote»

Important, please note: The details are kept on a secure server. No premiums will be collected until after the policy has started, and we will not start a policy until the underwriting process has been completed and we have your instructions to do so.



*Name of Bank/Building Society:

Address of Bank/Building Society:

Postcode:

*Name of Account Holder:

*Account Number:

*Sort Code:

Preferred Premium collection day of the month:

Submit

- » Either book your tele-underwriting call or let LifeQuote contact the client for you



	08:00 - 10:00	10:00 - 12:00	12:00 - 14:00	14:00 - 16:00	16:00 - 18:00	18:00 - 19:30	19:30 - 21:00
MON 16/05/2022							
TUE 17/05/2022							
WED 18/05/2022							
THU 19/05/2022							
FRI 20/05/2022							
	09:00 - 10:30	10:30 - 12:00					
SAT 21/05/2022							

[Next >](#)

Any other applications connected? No

Name: Mr L Wallace
Stet
Phone: Any

[Book a call](#)

Please note – you may not be able to book a call on your first application with each insurer. Please contact us for more details.

- 4. Once handed over to LifeQuote they will arrange the tele-underwriting appointment, if not already booked, complete the medical and lifestyle questionnaire before submitting the application.

LifeQuote provides a full non-disclosure guarantee on all telephone applications.

LifeQuote will then liaise with the clients, providers, surgeries and manage the application through to risk on your behalf.

Telephone: 01243 791199 Email: salesupport@lifequote.co.uk