

LifeQuote and XPLAN Mortgage user guide

LifeQuote’s application and administration services have been integrated into XPLAN Mortgage 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 XPM which you would like to process with LifeQuote.

Provider	Description	Policy type	Lives covered	Cover amount	Premium	Product selected	Generate documents	Demands & needs	Apply
FriendsLife	Friends Life Individual... Friends Life Protect+	Mortgage Protection	Driving Home	£250,000	£46.77	✓	📄	📄	🔄
		Critical Illness	Driving Home	£100,000		✓	📄	📄	🔄
VitalityLife	VitalityLife Essentials Vit Optimiser +...	Critical Illness	Driving Home	£124,955	£20.01	✓	📄	📄	🔄
Legal & General	Legal & General Mortgage Decr. Term + CIC (E)	Mortgage Protection	Driving Home	£250,000	£31.13	✓	📄	📄	🔄

2. Select the ‘admin service’ option in order to place the case with LifeQuote.

Product application ✕

Choose preferred application route

Provider
via VitalityLife

Admin service
via 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.

If you are unable to source the exact quote required via XPM, LifeQuote can add additional options for you. Contact the Sales Support Team on 01243 791199 for details.

3. Once you have selected to apply you will be redirected to the LifeQuote application screens. Some of the information will pre-populate from XPM.
 - » 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 Quotation](#)

Your client ref: [The key features document](#)

[Commission Terms](#)

We will automatically email these documents to the address supplied.

Client Details

Applicant 1

Sex: Male	*Marital status: Please select	*Postcode: <input type="text"/>
Date of Birth: 01/01/1985	*Occupation: Accountant	Get Address
Smoker: Never Smoked	*Employment status: Please select	*Address line 1: <input type="text"/>
*Title: Mr	Evening phone: <input type="text"/>	Address line 2: <input type="text"/>
*Forename(s): Scott	Daytime phone: <input type="text"/>	*Postal Town: <input type="text"/>
*Surname: Bakula	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.

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

LifeQuote»

	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
Slot:
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.

- 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: salessupport@lifequote.co.uk