

Email a quote to the client



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New business quote **How to email a quote to client**

1 Capture quote 2 Accept quote 3 Complete application 4 Finalise

Policy Role players Benefits **Proposal**

PROPOSAL

Quote prepared for: [REDACTED]

Prepared by: [REDACTED]

Total premium **R 455.19**

GENERATE QUOTE REPORT

No valid screening results were found, therefore a LifeReturns® offer cannot be included in this quote report. **Generate quote report**

Preferred language English Afrikaans

Show benefit premium projections Yes No

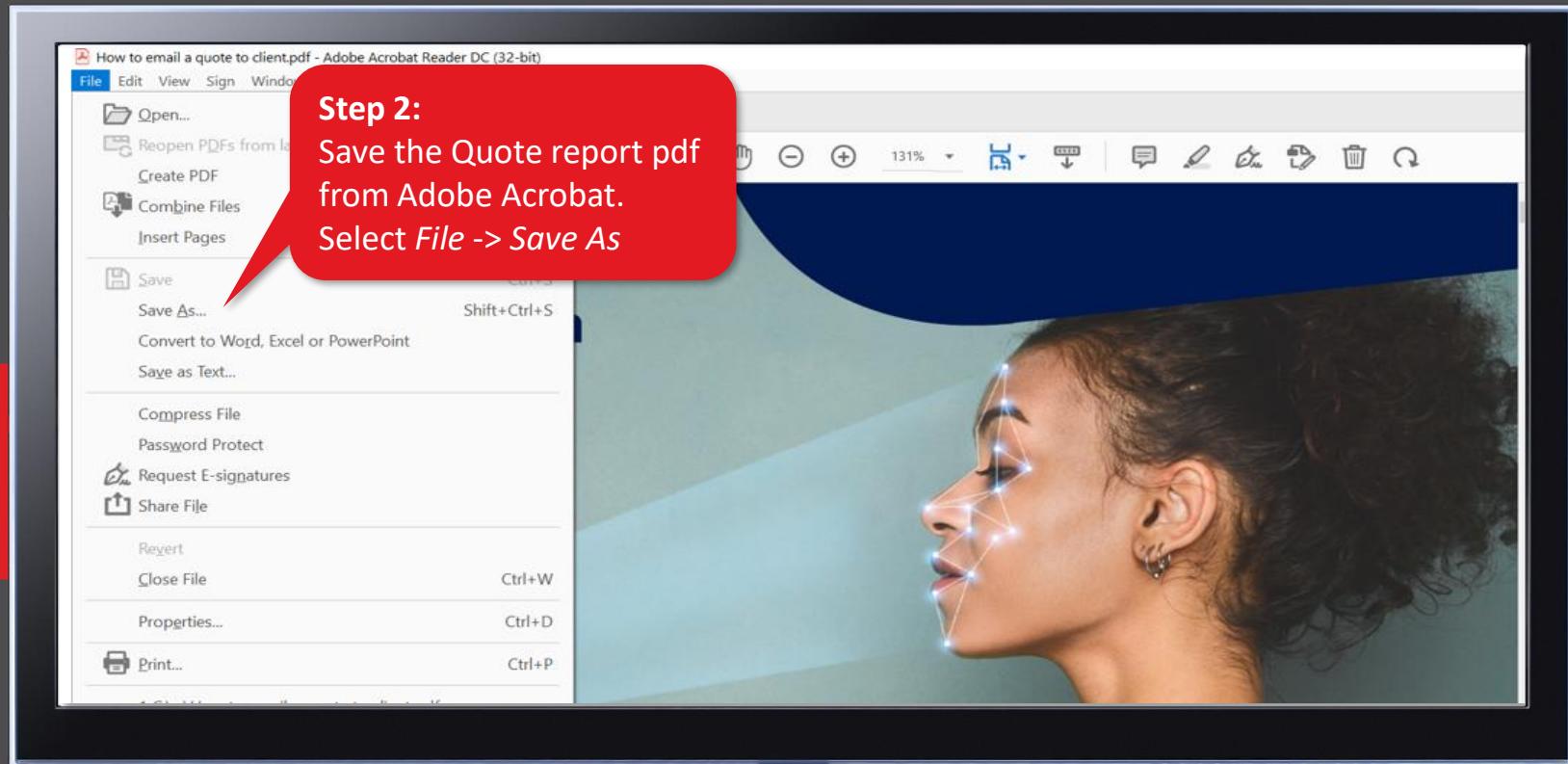
Investo Retirement Annuity

Please enter the retirement age in the allocated block below if you wish to display the illustrated Retirement Booster values for a client who has an existing, or will be taking up a new, Investo Retirement Annuity. If you do not want to display the Retirement Booster values, kindly select "untick" in the Investo Retirement Annuity tick box.

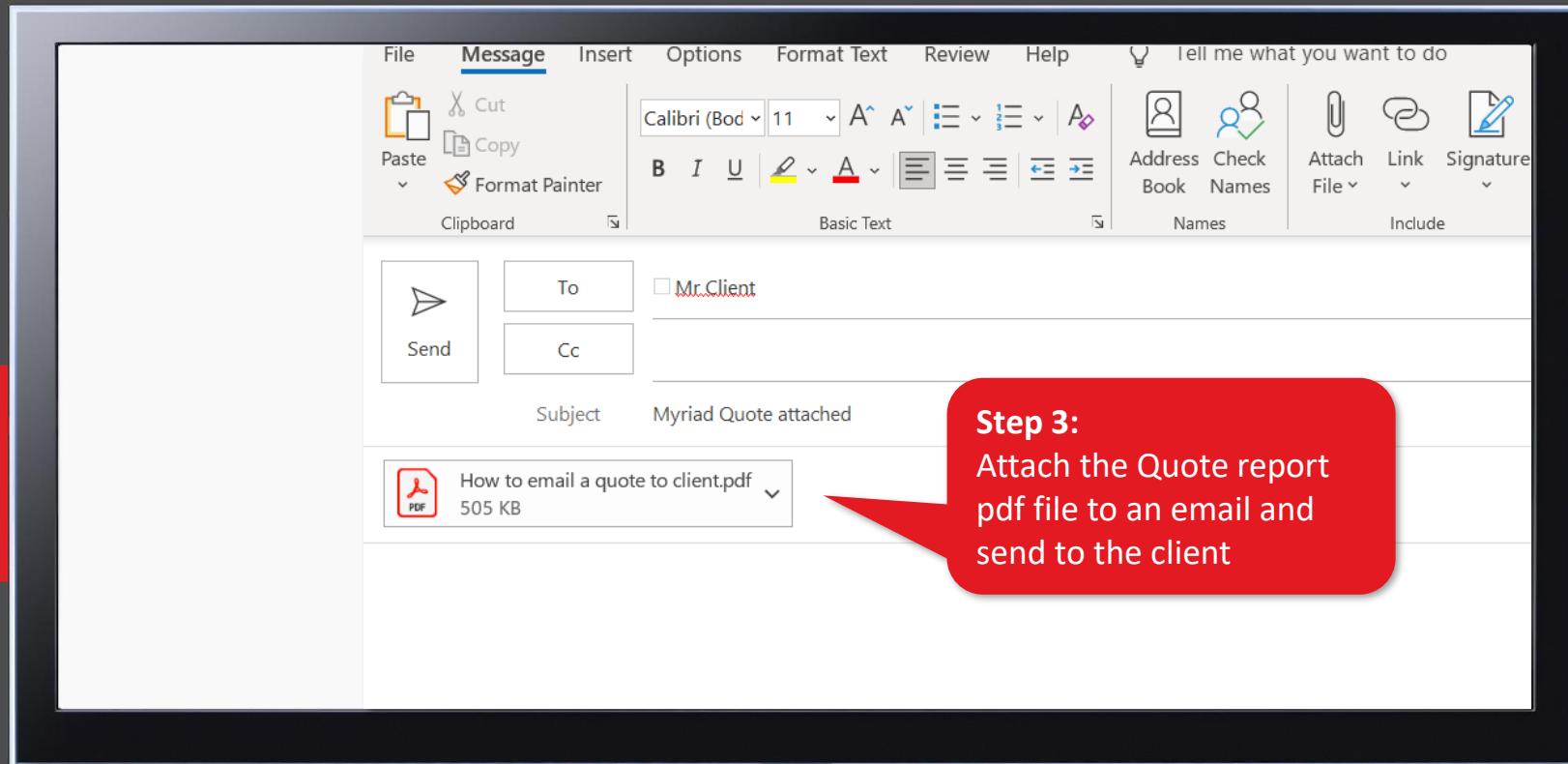
Retirement age

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Step 3:

Attach the Quote report pdf file to an email and send to the client