

# Fordyce & Playle

## Life Assurance Quotation Application

### Applicant 1 Information

Name:

Date of birth:

Phone:

Email:

Current address:

City:

County:

Postal Code:

Number of dependent children and age(s):

Employment Status:

Occupation:

Smoker Status:

### Applicant 2 Information

Name:

Date of birth:

Phone:

Email:

Current address:

City:

County:

Postal Code:

Number of dependent children and age(s):

Employment Status:

Occupation:

Smoker Status:

### Existing Mortgage Details

Date Commenced:

Amount: £

Term:

Repayment Type:

E-mail:

Fax:

*\*Give breakdown if split:*

*Repayment: £*

*Interest Only:£*

### Types of Protection Policies

- **Mortgage Protection Decreasing Term Assurance** - Sum assured decreases in-line with a repayment mortgage.
  - **Level Term Assurance** - Sum assured remains the same throughout the term of the policy and can be used for a mortgage or for personal/family protection.
  - **Family Income Benefit** - Provides an income for the survivor to assist in bringing up children until they reach working age, as opposed to the above policies that pay out a lump sum.
- \*If above policies are taken out in joint names they are normally on a 'joint life/first death basis'. If a claim is made during the term of the plan the cover finishes when sum assured payment made.
- **Whole of Life** - Generally used for inheritance tax purposes and if in joint names normally done on 'joint life/second death' basis.

#### Quote Required For

|                                     |               |      |
|-------------------------------------|---------------|------|
| Mortgage Protection Decreasing Term | Sum Assured £ | Term |
| Level Term Assurance                | Sum Assured £ | Term |
| Family Income Benefit               | £             | pa   |
| Whole of Life                       | Sum Assured £ | Term |

*Please note this form is for information gathering purposes only. This is not a life assurance application form and provides no advice. Once completed we will use the information to source quotes from a range of providers and will discuss all your options in full. The description of policy's above is a brief summary and doesn't represent the full facts. This should in no way be used to determine the type of contract you want without us providing you with more information.*