

New Business Administration process

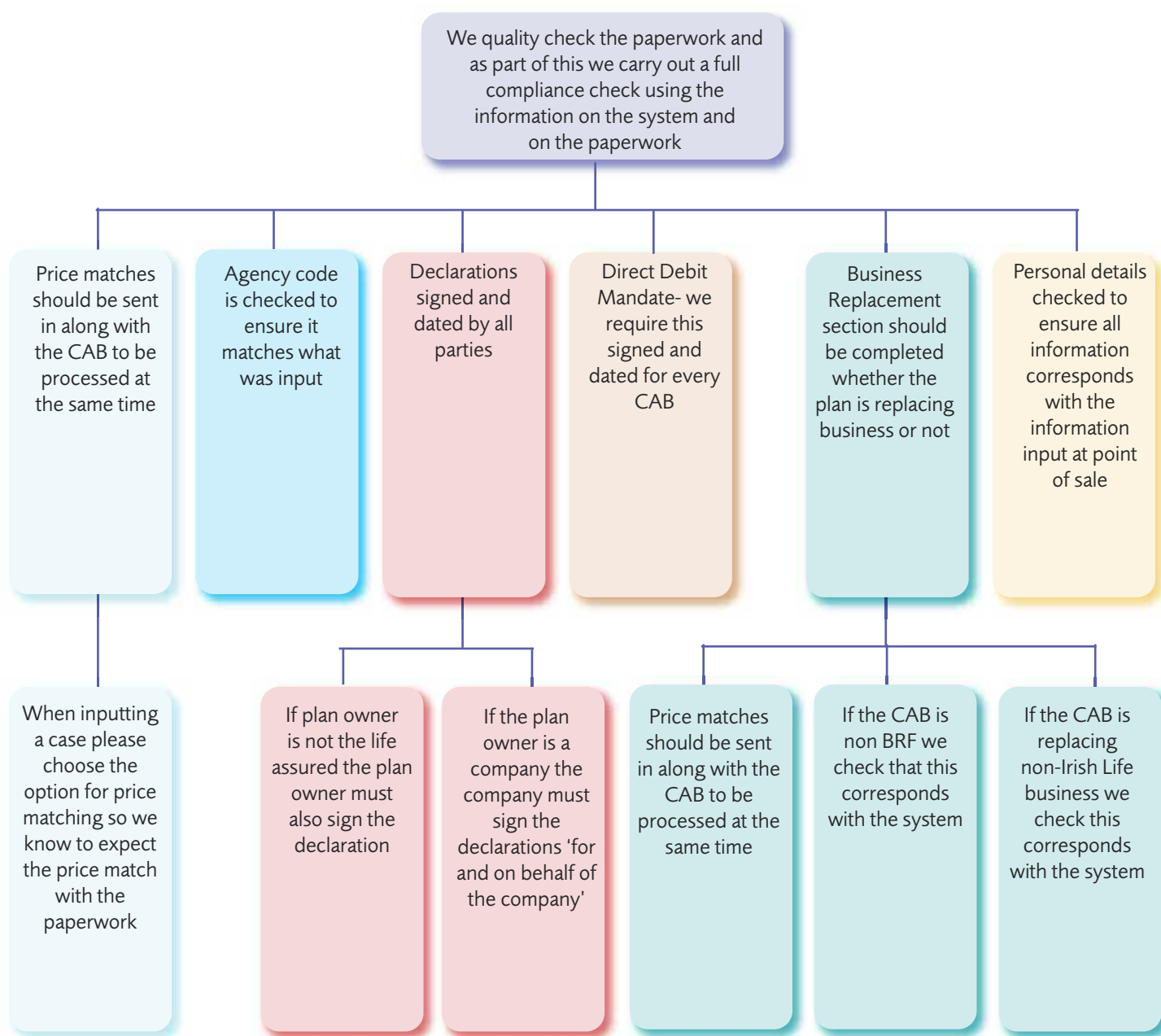


The following is an outline of our New Business compliance and quality checking process

Protection CAB

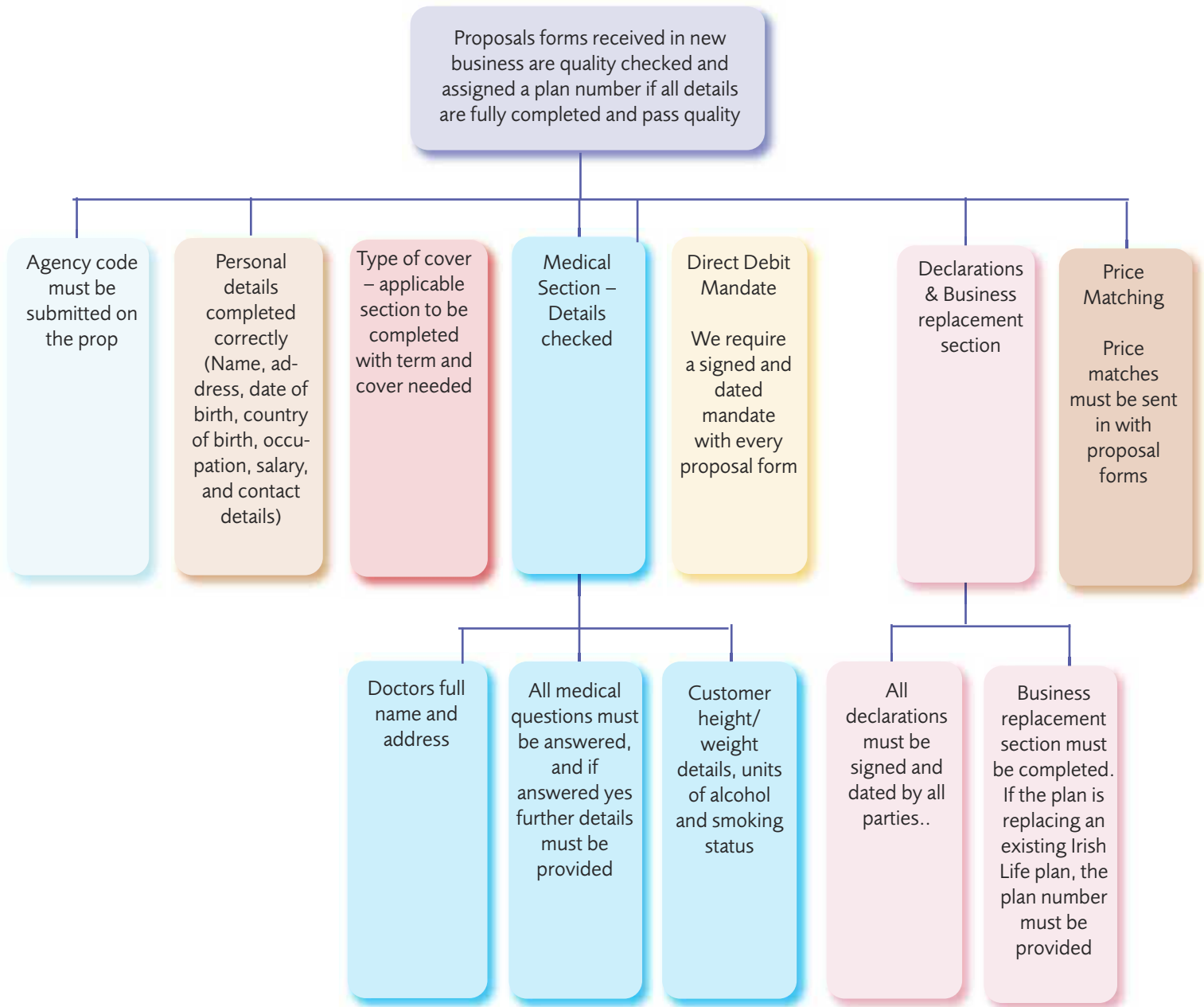
(Customer Application Booklet)

After you input a new plan online and all the documents are completed, you then forward the CAB into us in the New Business team.



Standalone protection form

Proposals forms received in new business are quality checked and assigned a plan number if all details are fully completed and pass quality. The case will either be automatically accepted or passed to underwriting for further information. You will receive an e mail if any further details are required



Issue of Plans

- Any special requests relating to the plan should be advised at the time of issuing of the plan.
- Once cases have been accepted, we can accept issue requests by phone or email. - At 01 704 1873 or by email to brokernewbus@irishlife.ie
- If there is no Date of Entry hold on the plan, the case will issue automatically once it is accepted and paperwork is marked off

Plan Documents

- If a plan is issued in the morning, documents should be available on Bline the same evening and should go out the same day