

QUICK QUOTE AND DETAILED QUOTE (SAVINGS)

Savings - Pinnacle

Savings Details

Payment Amount

€ 1,000.00 ✓

Payment Frequency

Monthly ▾

Additional Single Payment Amount

€ 10,000.00 ✓

Levy Inclusive

Fund Split

Regular Payment

Multi Asset Portfolio 3 Series R ▾ 100 ✓ % +
Total: 100%

Single Payment

☒ Invest the Single Payment in the same fund(s) as the Regular Payment?

Quick Quote requires minimum inputs to see an investment illustration.

Savings - Pinnacle

Personal Details

Alan	Mary
Name Alan ✓	Name Mary ✓
Surname Smith ✓	Surname Smith ✓
Address 1 High St ✓ Town ✓ County ✓	Address <input checked="" type="checkbox"/> Same as Person 1 1 High St Town County
Date of Birth 20/02/1986 ✓	Date of Birth 20/02/1986 ✓

Remove Person

Detailed quote allows you to input client's details for your report.

Detailed Quote allows you to choose a commission profile

Savings Details

Plan Type

Dual Lives ▾

Payment Amount

€ 1,000.00

Premium Inclusive of Levy

Yes No

Payment Frequency

Monthly ▾

Start Date

04/06/2020

Additional Single Payment Amount

€ 10,000.00

Indexation

Yes No

Fund Split

Regular Payment

Multi Asset Portfolio 3 Series R ▾ 100 ✓ % +
Total: 100%

Single Payment

☒ Invest the Single Payment in the same fund(s) as the Regular Payment?

Profile & Other Details

Other Details ✕

Main Premium

Commission Profile
22% * AP (4 * 5.5% bullets, 0.25% Fund (5686) ▾

Take Up
Introductory Commission
100 %

Renewal Commission
100 %

Additional Single Premium

Commission Profile
3% *SP (5690)

Take Up
Introductory Commission
100 %

Save