

STATEMENT OF SUITABILITY

Build report

Advisor Name

Bline Demo ✓

Advisor Firm Name

Adviser Plus Dummy Seller ✓

Disclosure Firm Name

(Include trading names if applicable)

Adviser Plus Dummy Seller ✓

Advisor Address

Adviser Plus Dummy ✓

Adviser Plus ✓

Advisor Phone Number

01 704 1010 ✓

Advisor Email

bline@irishlife.ie ✓

Client Name

Alan

Smith ✓

☐ Cover Letter

☒ Statement of Suitability

Product Guide

Use the tickbox to include a Statement of Suitability in your report

☒ Statement of Suitability

(Fields can be edited for the purpose of this report only)

Client Name

(To appear on Statement of Suitability only)

Alan Smith & Mary Smith

Date of Financial Review

11/07/2020 ✓

Client financial protection needs and objectives – max 400 characters

Clients are married with 2 young children. They currently have no cover in place and are looking to take out a protection product that will ensure their children are provided for should anything happen to them ✓

Recommendation (insert reason why this plan is the most suitable available, including plan features and other benefits) – max 400 characters

We are recommending Life Cover and SIC. This will ensure that the Smith's have cover and are looked after should they become seriously ill and not just in death. I am recommending SIC with Irish Life as they cover the most illnesses in the market ✓

Additional information if quotation differs from recommendation (eg affordability, client preference etc) – max 200 characters

The recommendation was for €300k life cover however due to affordability the Smith's have chosen to proceed with cover of €250k and €100k SIC ✓

Business Replacement – does the plan proposed by this quotation replace an existing plan in full or in part?

Yes

No

☒ Include "Why Irish Life for Financial Protection?"

Fill your recommendations into the free text boxes

NB

Detailed quote must be run in order to generate a report and include a statement of suitability

Use this tickbox to include a paragraph on why customers choose Irish Life for Financial Protection