

Payment Details

(Regular Payment)

Regular Payment Amount

Payment Frequency

Indexation

 Yes No

Include Single Payment

Include Transfer Payment

Transfer Payment Amount

 ✓

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POINTS TO NOTE

Transfers can be included for quotations only and cannot proceed to submission. Transfer Values still need to be submitted to New Business by paper

A number of the Transfer commission profile options have minimum age or term restrictions and these are not currently built into the system. Please make sure to check your product terms when quoting and check with your account manager if you are unsure on anything

Commission will only be paid on external transfers

Transfer Values can be included when quoting for PRSA plans