

MyQuotes

Background RevMax User Guide

MyQuotes Company Pension Quote

1

2

3

Select ProductPersonal & Plan DetailsQuote Results

Pension

Company Pension

What product would you like to quote for?

Complete Solutions Company 1

Quotation Type

Premium

Target Fund

Target Pension

How would you like to run your quote?

Quick

Detailed

Personalised quote with additional benefits

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- Background RevMax check runs on all detailed company pension quotes
- Compares strict and uplifted scales & gives best result

MyQuotes Company Pension Quote

Enter quote details

✓

2

3

Select ProductPersonal & Plan DetailsQuote Results

Pension

Company Pension - Complete Solutions
Company 1

Personal Details

Name

Joe ✓

Surname

Bloggs ✓

Address

Main Street ✓

Dublin ✓

Date of Birth

01/01/1980 ✓

Gender (assigned at birth)

Male

[Learn more](#)

Marital Status

Married

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✓

2

3

Select ProductPersonal & Plan DetailsQuote Results

Pension

Company Pension - Complete Solutions
Company 1

Employment Details

Employer Name

ABC Ltd ✓

Retirement Age

65 ✓

Current Employment Start Date

01/01/2010 ✓

Annual Schedule E Income

€ 35,000.00 ✓

Tax Rates

Marginal Tax Rate

40 %

[Learn More](#)

Company Tax Rate

12.5 %

[Learn More](#)

Payment Details

(Regular Payment)

[Learn More](#)

Employer Amount

€ 2,500.00 ✓

Employee Amount

€ 0.00

AVC

€ 0.00

Payment Frequency

Monthly

Indexation

Yes

No

☒ Include Single Payment

(Single Payment)

Employer Payment

€ 50,000.00 ✓

AVC Payment

€ 0.00

Fund Split

Regular Payment			
Multi Asset Portfolio 4 Series P	✓	50 ✓ %	
Multi Asset Portfolio 5 Series P		50 ✓ %	+ -
Total: 100%			

MyQuotes Other Pension Details

Fund Split

Regular Payment

Multi Asset Portfolio 4 Series P	✓	50	✓	%
Multi Asset Portfolio 5 Series P	▼	50	✓	%

Total: 100%

Single Payment

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

Illustrative Growth Rates

Maximum Main Illustration %

4.50

☐ Include Second Growth Rate Illustration

+ Other Pension Details

+ Profile & Other Details

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Finish

To add information on client's existing pensions click [Other Pension Details](#)

Note: if this information is not included RevMax check will not run correctly

MyQuotes Other Pension Details

Payment Frequency

Other Pension Details

About Current and Previous Pension

☐ I have pensions from current employment

☒ I have pensions from previous or self employment

Close

In the pop up add client's pension from

- current employment,
- previous employments, and
- previous self employments

Click close to add the information to the quote.

Other Pension Details

About Current and Previous Pension

☒ I have pensions from current employment
(DC Company Pension, AVC, PRSA AVC and PRB)

Total current value

€ 20,000.00 ✓

Total current employer payment per year

€

Total current employee / AVC payment per year

€

(Personal Pension and PRSA)

Total current value

€

(Defined Benefit Scheme)

Gross Pension income at retirement per year

€

Gross retirement lump sum

€

Spouse's pension

Please Select

Total current employee / AVC payment per year

€

☐ I have pensions from previous or self employment

Close

Life Assurance plc Registered Office: Lower Abbey Street, PO Box 129, Freeport, Dublin 1, Phone: 01 704 2

MyQuotes Results Screen – Failed RevMax


Revenue Maximum Limits Exceeded

Based on the information entered the requested payment amounts are in excess of overall Revenue Maximum funding limits. You will not be able to generate a report or submit a proposal for this illustration. The maximum payment amounts allowable, including any existing payments, are:

	Maximum Employer Single Payment	Matching Payment	Maximum Employer Regular Payment
Single Payment	€181,905.87	€24,223.98	€0.00
Annual Payment	€17,504.42	€24,223.98	€25,256.27

Note the amounts illustrated do not take account of product limits.

Please review the information input or talk to your Account Manager.

[Download as PDF](#) 

[Adjust Payment](#) [OK](#)

Martial status Married

Annual Schedule E Income €35,000.00 per year

In the payment is outside RevMax limits a pop up will appear on the Results Screen.

In the pop up, you can

- Download RevMax report
- Adjust payment amount on premium quotes
- Close pop up & view results screen

You cannot proceed to online submission or generate client company pension report until payments are within RevMax limits.

MyQuotes Results Screen – Pop Up Options

FundPlanTotalRisk

Revenue Maximum Limits Exceeded

Based on the information entered the requested payment amounts are in excess of overall Revenue Maximum funding limits. You will not be able to generate a report or submit a proposal for this illustration. The maximum payment amounts allowable, including any existing payments, are:

	Maximum Employer Single Payment	Matching Payment	Maximum Employer Regular Payment
Single Payment	€181,905.87	€24,223.98	€0.00
Annual Payment	€17,504.42	€24,223.98	€25,256.27

Note the amounts illustrated do not take account of product limits.

Please review the information input or talk to your Account Manager.

Regular Payment - Monthly

[Learn More](#)

	Employer	Employee	AVC
Revised Payment	€2,500.00	€0.00	€0.00

Single Payment

	Employer	AVC
Revised Payment	€50,000.00	€0.00

Download as PDF

Save Changes

✗

Note: Based on the information provided these payments exceed the overall Revenue maximum funding limits.

ILLUSTRATION DATE: 15/07/2021

Irish Life

REVENUE MAXIMUM CALCULATION RESULTS

	MAXIMUM EMPLOYER SINGLE CONTRIBUTION	MATCHING CONTRIBUTION	MAXIMUM EMPLOYER REGULAR CONTRIBUTION
Single Contribution	€306,696.44	€39,701.16	€0.00
Annual Contribution	€28,323.26	€39,701.16	€41,393.01

YOUR DETAILS

YOUR NAMEJoe Bloggs

DATE OF BIRTH01/01/1980

RETIEMENT AGE65

GENDERMale

MARITAL STATUSMarried

EMPLOYER NAMEABC Ltd

EMPLOYMENT START DATE01/01/2010

SCHEDULE E EARNINGS€55,000

PENSION DETAILS

DC COMPANY PENSIONS, PRBS, PERSONAL PENSIONS & PRSAs

	Defined Contribution Pension, AVCs & PRB	PRSA & Personal Pension
Current Employment	€20,000	€0
Previous Employment	€0	€50,000

DEFINED BENEFIT PENSIONS

	Yearly Pension Income	Retirement Lump Sum
Current Employment	€0	€0
Previous Employment	€0	€0

MyQuotes Results Screen – Within RevMax

No automatic pop on results screen where payments are within RevMax limits.

Pop up can be opened by clicking [View RevMax](#) at bottom of Results Screen

In the pop up, you can

- Download RevMax report
- Adjust payment amount on premium quotes

Retirement Benefits


Illustration

Benefits and Charges

(Illustration based on 3.43%)

	Value At Retirement	Value in today's terms
Retirement Fund:	€432,080	€304,896
25% Retirement Lump Sum:	€108,020	€76,224
Fund available for AMRF/ARF:	€324,060	€228,672
Or		
Employee Pension:	€14,259	€10,062
Or		
Retirement Lump Sum:	€116,914	€82,500
Reduced Employee Pension:	€10,400	€7,339

[Assumptions](#)



✓ Note: Based on the information provided these payments are within the overall Revenue maximum funding limits.

[View RevMax](#)

[Back](#)

[More Options](#)

Revenue Maximum Limits

Based on the information entered the requested payment amounts are within overall Revenue Maximum limits. The overall Revenue Maximum limits are:

	Maximum Employer Single Payment	Matching Payment	Maximum Employer Regular Payment
Single Payment	€306,696.44	€39,701.16	€0.00
Annual Payment	€28,323.26	€39,701.16	€41,393.01

Note the amounts illustrated do not take account of product limits.

Regular Payment - Monthly

[Learn More](#)

	Employer	Employee	AVC
Revised Payment	€1,000.00	€0.00	€0.00

Single Payment

	Employer	AVC
Revised Payment	€50,000.00	€0.00

[Download as PDF](#)

[Save Changes](#)

✓ Note: Based on the information provided these payments are within the overall Revenue maximum funding limits.

MyQuotes Report Builder – Within RevMax

Select **RevMax Details** to include the one page RevMax report at the back of the client company pension report.

Build report

Advisor Name

Tester McTestFace

Advisor Firm Name

Company ✓

Disclosure Firm Name
(Include trading names if applicable)

Company ✓

Advisor Address

2 Main St ✓

Dublin ✓

Advisor Phone Number

Advisor Email

Client Name

Joe

Bloggs

☐ Cover Letter

☒ RevMax Details

☐ Fund Factsheets

Product Guide

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Get Report

MyQuotes COMPANY PENSION END TO END REMOTE ENABLEMENT

Complete
your
personalised
client quote
with
**REVMAX
CHECK**
on

MyQuotes

Generate your
**BRANDED
REPORT**
and
**REVMAX
REPORT** &
share by email
or screen share



Launch into
our **EPOS
SYSTEM**



Use
**EDITABLE
PDF**
New Business
Application
forms



Use **E-Sign**
from our list
**APPROVED
PROVIDERS**
for all New
Business
Applications



Quotation

Supported Advice

Submission

Fulfillment



Support For You

As always your Account Manager will be your key support for MyQuotes.

Sales Support are also available to assist with queries on MyQuotes.

Additionally specialist dedicated 1-2-1 training support will be available to you and your staff at a regional level via Zoom / Goto meeting. Please speak to your Account Manager to arrange.



Your Feedback

Is there an improvement that we can make to our MyQuotes system that would improve your experience - we welcome your feedback.

If you have feedback or new idea's that you would like us to consider - Please let us know.

You can leave feedback directly on MyQuotes



Contribute Feedback

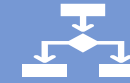
Was there an error or do you have feedback?

☐ An error occurred

☐ Other feedback

Next

Or alternatively you can Email us on - myquotes@irishlife.ie



Support Material

Bline Resource Page:

- Trouble shooter videos
- Trouble shooter guides
- Key Features Flyer

<https://my.bline.ie/myquotes>

Helpdesk Support

Are you experiencing one of the issue's listed below, that is preventing you from completing a quote – Support is available.

- Reset a Bline account password
- Set up a new user Bline account
- Repot a system bug
- Report an error message
- Report incorrect information

Helpdesk Phone: 01 704 1877

Helpdesk Email: partnersupport@irishlife.ie

Thank You

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Irish Life Assurance plc, Registered in Ireland number 152576, VAT number 9F55923G.