

MyQuotes

Background RevMax User Guide

MyQuotes Company Pension Quote

1 — 2 — 3

Select Product Personal & Plan Details Quote 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

Back Next

- 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

1 2 3
 Select Product Personal & Plan Details Quote Results

Pension

Company Pension - Complete Solutions
Company 1

Personal Details

Name: ✓

Surname: ✓

Address: ✓
 ✓

Date of Birth: ✓

Gender (assigned at birth): ✓

Marital Status: ✓

1 2 3
 Select Product Personal & Plan Details Quote Results

Pension

Company Pension - Complete Solutions
Company 1

Employment Details

Employer Name: ✓

Retirement Age: ✓

Current Employment Start Date: ✓

Annual Schedule E Income: ✓

Tax Rates

Marginal Tax Rate: ✓

Company Tax Rate: ✓

[Learn More](#)

Payment Details

(Regular Payment)
[Learn More](#)
 Employer Amount: ✓

Employee Amount:

AVC:

Payment Frequency:

Indexation: Yes No

Include Single Payment

(Single Payment)
 Employer Payment: ✓

AVC Payment:

Fund Split

Regular Payment	Allocation	Percentage
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

Back 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

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


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](#)

Marital status **Married**

Annual Schedule E Income €35,000.00 per year

If 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

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
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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



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 NAME	Joe Bloggs	GENDER	Male
DATE OF BIRTH	01/01/1980	MARITAL STATUS	Married
RETIREMENT AGE	65		
EMPLOYER NAME	ABC Ltd		
EMPLOYMENT START DATE	01/01/2010		
SCHEDULE E EARNINGS	€55,000		

PENSION DETAILS

DC COMPANY PENSIONS, PRBS, PERSONAL PENSIONS & PRSAs		CURRENT VALUES
Current Employment	Defined Contribution Pension, AVCs & PRB	€20,000
	PRSA & Personal Pension	€0
Previous Employment	Defined Contribution Pension, AVCs & PRB	€0
	PRSA & Personal Pension	€50,000

DEFINED BENEFIT PENSIONS		FUTURE BENEFITS
Current Employment	Yearly Pension Income	€0
	Retirement Lump Sum	€0
Previous Employment	Yearly Pension Income	€0
	Retirement Lump Sum	€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

Advisor Firm Name

Disclosure Firm Name
(Include trading names if applicable)

Advisor Address

Advisor Phone Number

Advisor Email

Client Name

Cover Letter ▼
 RevMax Details
 Fund Factsheets

[Product Guide](#) 📄

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

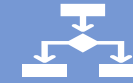
Was there an error or do you have feedback?

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



my.bline.ie/digital/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
- Report a system bug
- Report an error message
- Report incorrect information

Helpdesk Phone: 01 704 1877

Helpdesk Email: partnersupport@irishlife.ie

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