Quotation Checklist

Please ensure that all relevant sections are completed before making a quotation request.
All quotation requests should be emailed to grpriskquote@zurich.com

1. Quotation Details

Member Level Data	Completed
Gender	
Date of birth	
Salary	
Occupation	
Marital status (If SPDIS or benefit is dependent on status)	

Scheme Level Data	Completed
Company name/industry	
Billing frequency	

Note: Take up rate is the expected percentage of employees to join the scheme out of all eligible employees.

Life	Completed
New to insurance or existing • If existing, please provide claims information for the previous 5 years and any adverse underwriting terms	
Compulsory/Discretionary/Voluntary • Take up rates for voluntary schemes • Percentage of members to be included out of eligible population in a discretionary scheme	
Eligibility	
Benefit structure	
NRA	
Continuation option	

Spouse's Pension	Completed
Eligibility	
Benefit Structure • Spouse/Dependent/Coverall benefit • Children's pension • Orphan's pension	
Escalation rate	

1. Quotation Details (continued)

Note: Take up rate is the expected percentage of employees to join the scheme out of all eligible employees.

Income Protection	Completed
New to insurance or existing • If existing, please provide claims information for the previous 5 years and any adverse underwriting terms	
Compulsory/Discretionary/Voluntary • Take up rates for voluntary schemes • Percentage of members to be included out of eligible population in a discretionary scheme	
Eligibility	
Benefit structure	
Premium Protection Benefit	
Cost of life	
Deferred period	
Escalation rate	
NRA	
Continuation option	

Note: Take up rate is the expected percentage of employees to join the scheme out of all eligible employees.

Serious Illness	Completed
New to insurance or existing • If existing, please provide claims information for the previous 5 years and any adverse underwriting terms	
Compulsory/Discretionary/Voluntary • Take up rates for voluntary schemes • Percentage of members to be included out of eligible population in a discretionary scheme	
Eligibility	
Benefit structure	
NRA	

2. Claims Details

Note: Please be aware of the difference between **New to Insurance** and **New to ZLAP**. If it is **new to insurance** then it is a brand new scheme with no insurance arrangement in place and there will be no claims history. If the scheme is **new to ZLAP** then there is an existing policy that we will need full details on in order to be able to price the scheme.

Life/Serious Illness	Completed
Number of members in the scheme for each of the last five years	
Total sum assured for each of the past five years	
Cost of each claim and the claim year.	
Nature of serious illness claim	

2. Claims Details (continued)

Income Protection	Completed
Number of members in the scheme for each of the past five years	
Total sum assured	
Claimant Information (Past, Present and Pending)	
Date of birth	
Current Annual Benefit	
End of deferred period	
Cease date of claim (if claim has ceased)	
Nature of illness	

3. Adverse Underwriting Terms

Any member who has existing adverse terms will need to be notified to ZLAP.

Adverse Terms (Life & IP)	Completed
Date of birth	
Gender	
Benefit	
Details of adverse terms	

4. Long Term Absentees

Note: If the scheme is new to insurance we will need to know of any member absent for more than 3 consecutive working days in the previous 6 months, or since date of joining service, if shorter. If the scheme is existing we will need to know of any member who is currently absent for more than 30 days.

LTAs	Completed
Date of birth	
Gender	
Salary	
Date of first absence	
Reason for absence	

5. Residency

Residency	Completed
Are all employees resident in Ireland and are paid tax under Irish taxation rules? If not details are required	

6. Foreign Travel Information

Foreign travel	Completed
Is there any Insured Person who goes or intends to go on business trips to places other than the UK, EU, North America, Australia, New Zealand, Switzerland, Norway, Hong Kong, Singapore, Japan, China, India (excluding Kashmir or Jammu), Canada, Liechtenstein, Andorra, South Korea and Iceland.	
If Yes, details of the countries travelled to, the frequency and duration of the trip(s)	

Zurich Life Assurance plc
Zurich House, Frascati Road, Blackrock, Co. Dublin, A94 X9Y3, Ireland.
Telephone: 01 283 1301 Fax: 01 283 1578 Website: www.zurich.ie

Zurich Life Assurance plc is regulated by the Central Bank of Ireland.

The information contained herein is based on Zurich Life's understanding of current Revenue practice and may change in the future.

Intended for distribution within the Republic of Ireland.

GR: 21216 Print Ref: ZL LOP 7553 0326