

# The Life Annuities and Investments Quote System is lean, and oh so mean

At Sanlam, we are committed to improving our processes, and finding ways to make intermediaries' work lives easier. The Life Annuities and Investments Quote System is a case in point, offering simpler systems and automatic data capture to streamline the way our intermediaries will do business with us.

## Stress-free quotes

For time-deficient, stressed intermediaries who are balancing social distancing with maintaining Life Investments inflows and service excellence, the need for hassle-free digital processes has become urgent. The Life Quote System ticks many of those boxes and its four key features could be life-changing.

### 1. Manage

Search and manage client information easily by creating and maintaining details from one central point. Automatic data capture lets you open new quotes for existing clients without having to re-enter their information.

### 2. Create

Input your client's investment details and select policy objectives through a simple web-based process where rates are automated on a weekly basis. Adjust values and variables as you go without having to open a new quote.

### 3. Generate

Receive a quick quote and product summary for your client's new or existing investment. The system will automatically generate a PDF proposal for you to download and share with your client.

### 4. Submit

Coming soon! We are developing a feature that allows you to download and submit application forms in an easy, paperless process so your clients can sign digitally.

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