

# New Business Administration process

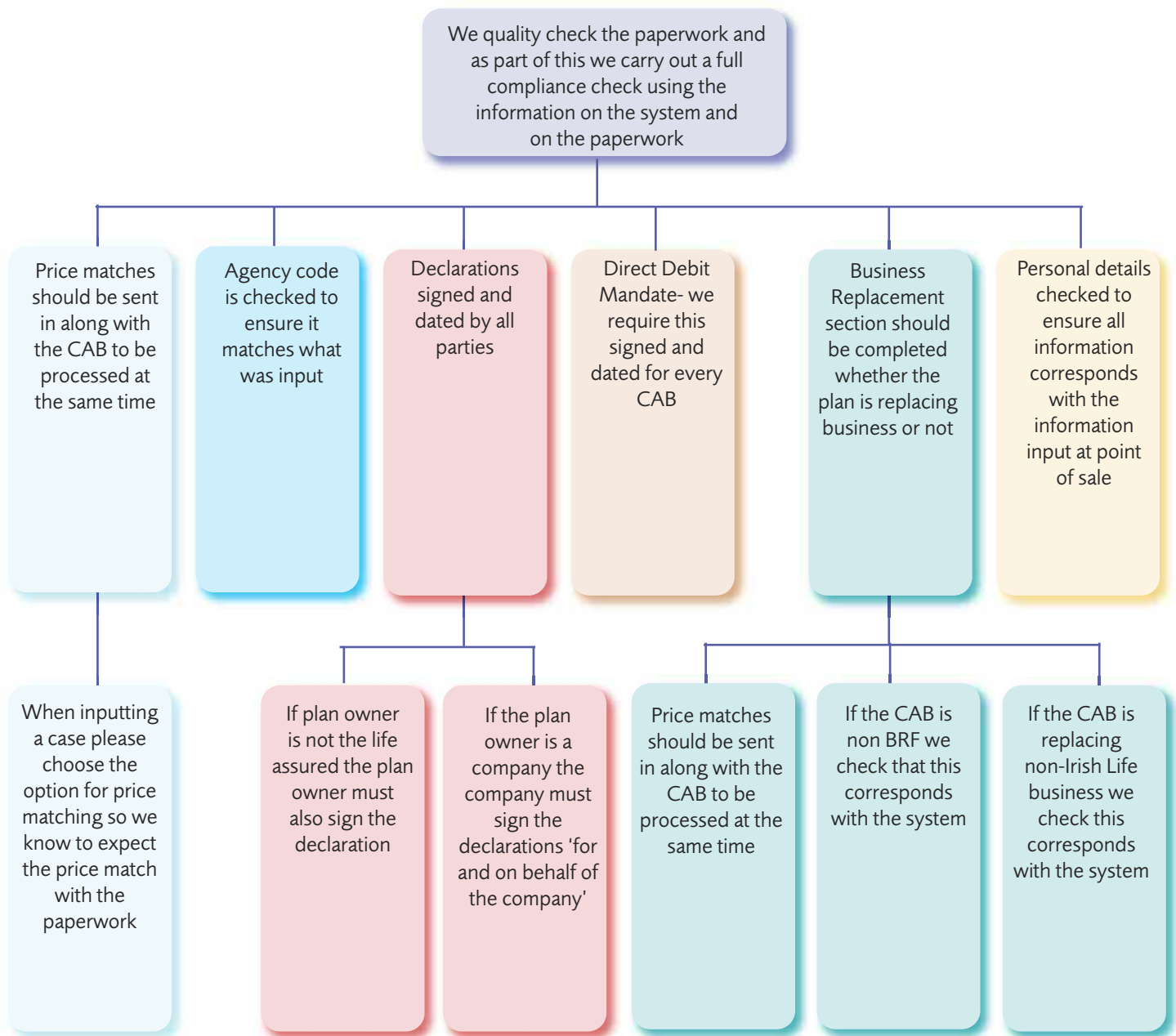


The following is an outline of our New Business compliance and quality checking process

## Protection CAB

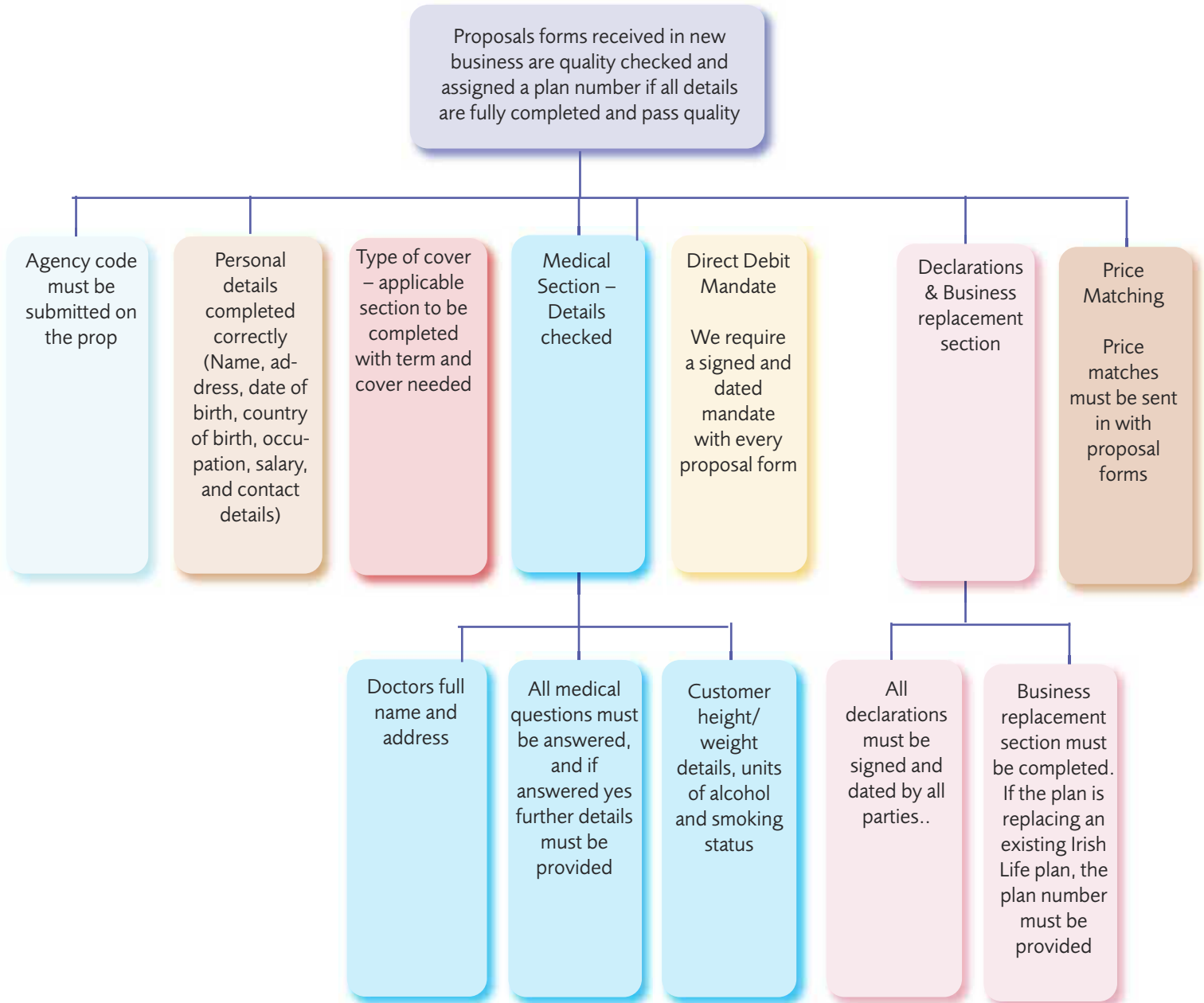
(Customer Application Booklet)

After you input a new plan online and all the documents are completed, you then forward the CAB into us in the New Business team.



## Standalone protection form

Proposals forms received in new business are quality checked and assigned a plan number if all details are fully completed and pass quality. The case will either be automatically accepted or passed to underwriting for further information. You will receive an e mail if any further details are required



## Issue of Plans

- Any special requests relating to the plan should be advised at the time of issuing of the plan.
- Once cases have been accepted, we can accept issue requests by phone or email. - At 01 704 1873 or by email to [brokernewbus@irishlife.ie](mailto:brokernewbus@irishlife.ie)
- If there is no Date of Entry hold on the plan, the case will issue automatically once it is accepted and paperwork is marked off

## Plan Documents

- If a plan is issued in the morning, documents should be available on Bline the same evening and should go out the same day