

# GETTING STARTED WITH BRITISH FRIENDLY

Public

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**Siobhan**

Quantity Surveyor,  
highboard diving coach and  
British Friendly member



A quick guide to our  
systems and processes

**BRITISH  
FRIENDLY**  
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# HOW TO FIND OUR ADVISER WEBSITE

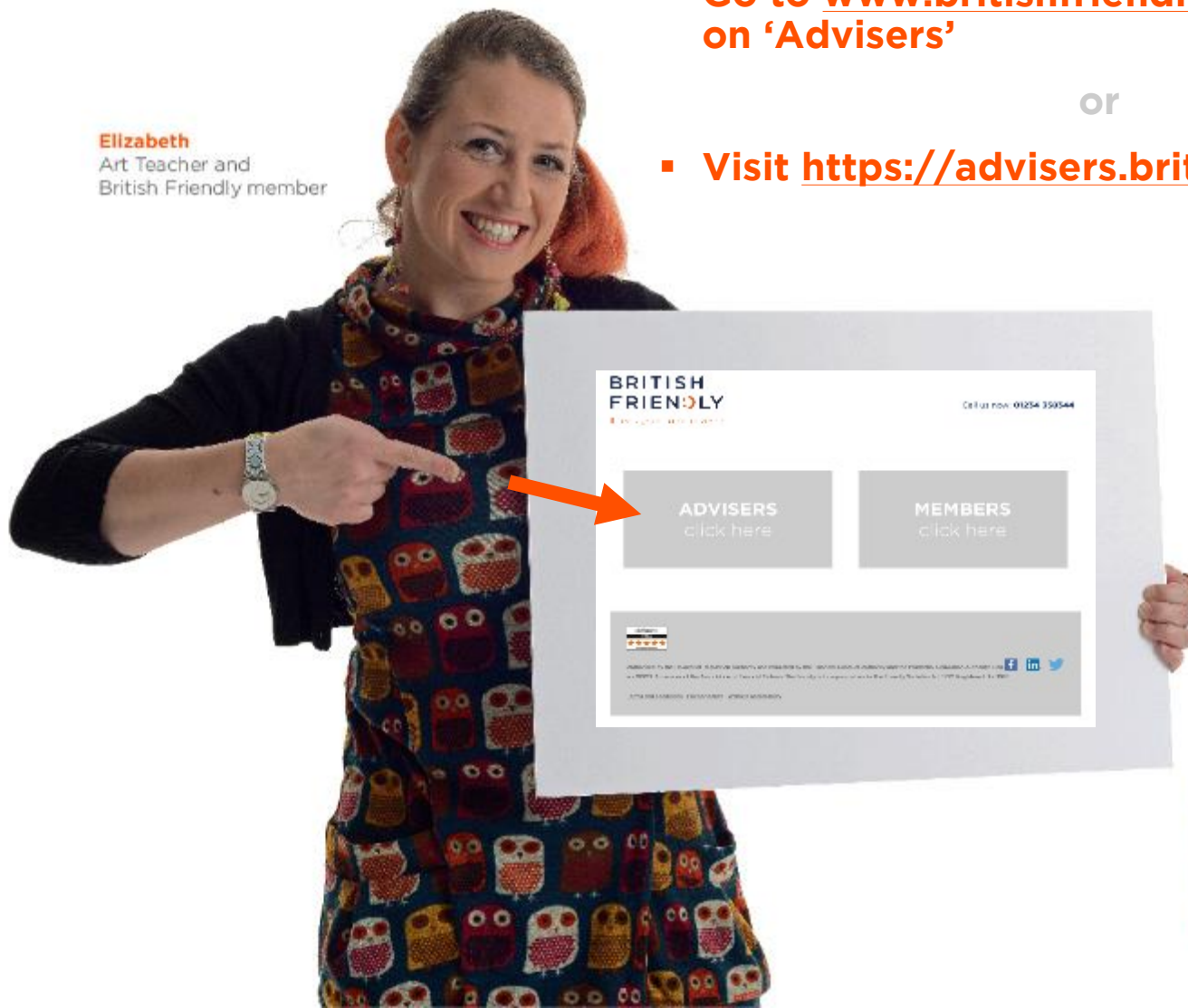
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- Go to [www.britishfriendly.com](http://www.britishfriendly.com) and click on 'Advisers'

or

- Visit <https://advisers.britishfriendly.com/>

**Elizabeth**  
Art Teacher and  
British Friendly member

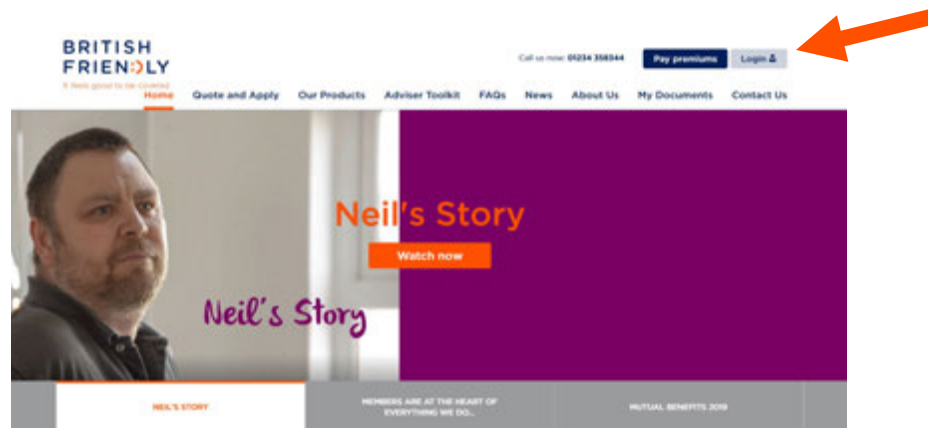


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# HOW TO LOGIN

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1. Go to <https://advisers.britishfriendly.com/>
2. Click on the blue 'Login' button in top right corner of the website

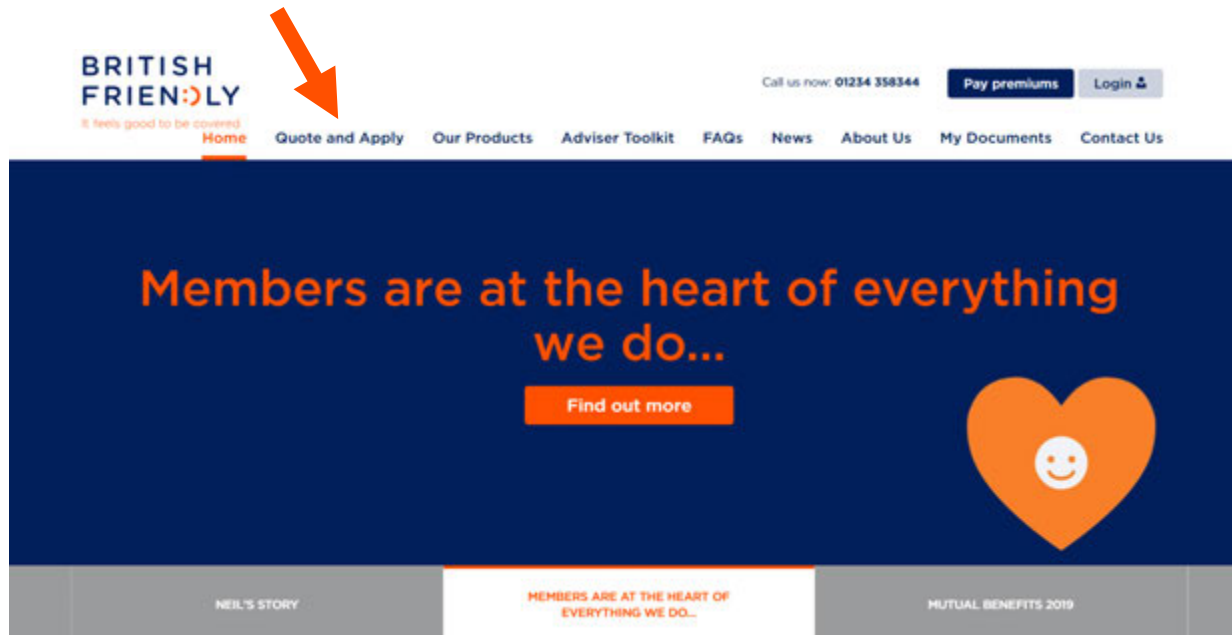


3. Once logged in, you can access the quote & apply system for applications, view documents and start the Online Medical Questionnaire (OMQ)

# HOW TO GET A QUOTE

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1. Go to <https://advisers.britishfriendly.com/> click on 'Quote and Apply'



2. Start a quote

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# HOW TO PRINT, SAVE AND E-MAIL QUOTES

Public

1. **Get a quote**
2. **Click on 'Get a Personal Illustration'**
3. **Complete the 'Your Personal Details' section and click on 'Get a Personal Illustration'**
4. **E-mail, save or print**
  - a) To e-mail: click on the 'Email' button to send the quote to you and/or your client
  - b) To save: click on the 'Save' button (This will save into your login portal and can be found on the home screen under 'Your Account' along with any other saved applications)
  - c) To print: click on the 'Print' button

## Your Quote

**BFS Protect Short Term Protect**

**£128.00**  
per month  
£2000.00 monthly benefit  
Policy Premiums >

Covers you for £2,000.00 a month.

Amend quote

- 4 week deferred period
- 2 year claim length
- Monthly benefit must be between £718.67 and £2,011.66
- You must have a minimum of 5 years until retirement
- Retirement age of 60
- You can prove your taxable income

**Apply now**

**Get a personal illustration**

## Your application

**Your personal details**

This must be the client's primary email address in order to proceed with the application

Your email address\*

Gender (select)\*

We'll send important information such as details of your quote, application and news about the Society to this address. We'll never call your e-mail address to fund a loan, for marketing purposes.

I don't have an email address

First name\*

First name\*

Last name\*

Gender\*  Male  Female

Display comments on Personal Statement  Yes  No

**Get a personal illustration** **Apply**

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Home Quote and Apply Our Products Adviser Toolkit FAQs News

Help Clare Simpson **Pay premiums** **Your account**

**new quote & apply**

Saved quotes and applications (not submitted)

Your policyholders

**Account settings** **Log out**

**4b**

**4**

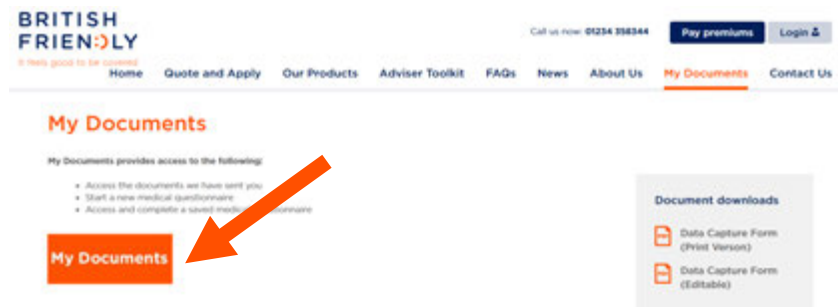
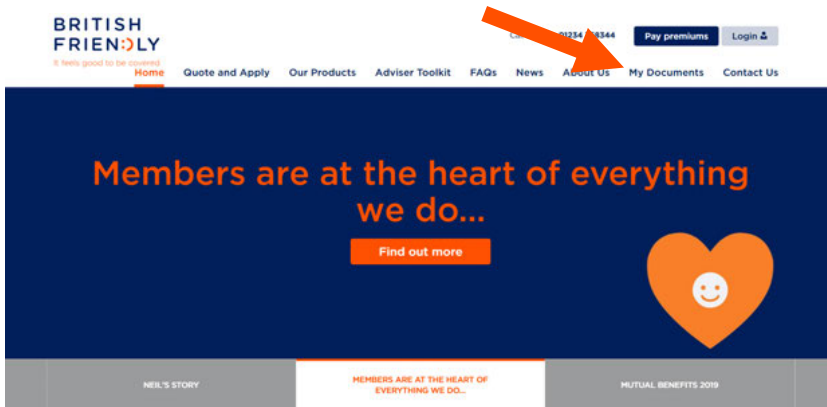
**4**

**4**

# HOW TO FIND YOUR DOCUMENTS

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1. Go to <https://advisers.britishfriendly.com/>
2. Login to our separate document portal



3. Click on the 'Documents' tab and to display a list view and download as a PDFs



- a) All outstanding information can be found here including terms letters, illustrations sent with terms, etc.
- b) If you would like updates on outstanding information (GPR's, client questionnaires, MRCF's, Tele-Interviews) please call us on 01234 358 344

# SUBMITTING OR SAVING AN OMQ

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1. **Complete the application and click on 'Go to the Online Medical Questionnaire' (if submitting straight after the application, the OMQ will pre-populate)**
2. **Start the OMQ**
  - a) If you need to stop and complete it later, click 'save' to save a partially completed OMQ (a saved OMQ will appear under 'My Documents' and 'Medical Questionnaires' in your account)
  - b) If you need to go back and change anything or check if you've missed any sections, click 'review and submit'
3. **Once the OMQ is complete, tick the declaration box, wait a few seconds and then click the 'Next' button which will turn dark blue when ready**
4. **If the OMQ has not be done straight after the application form, please complete Section 9 before clicking 'Submit'**

## Your application



### Thank you

You have successfully completed a medical questionnaire and your application has been formally accepted. Please click on the 'Go to the Online Medical Questionnaire' button to begin the medical questionnaire process. If you choose to go to the online medical questionnaire, you will be able to save your partially completed questionnaire and return to it at a later date. Alternatively, you can complete the questionnaire as a transaction by simply logging in and submitting your medical questionnaire.

It is important to remember that to complete the application has been formally accepted and the online medical questionnaire, you will be able to save your partially completed questionnaire and return to it at a later date. Alternatively, you can complete the questionnaire as a transaction by simply logging in and submitting your medical questionnaire.

Go to the Online Medical Questionnaire

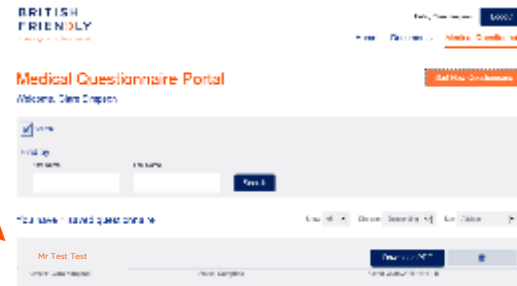
Go to the Online Medical Questionnaire

Save

### Your quote

Name	Mr. XXXX XXXX
DOB	20/11/1971
Policy no.	20021234567890
Product type	Short Term Product
Monthly cost	£2,000.00
Weekly cost	£701.51
Term length	1 year
Class of person	Home
Additional	No

2a



2a & 2b



3





# USEFUL INFORMATION

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**ian**  
Project Manager and  
British Friendly member

## ▪ Helpful contacts:

- Sales - Midlands
  - Debbie Bonser (Senior NAM)
    - E: [d.bonser@britishfriendly.com](mailto:d.bonser@britishfriendly.com)
    - M: 07398 175217
  - Lewis Donald (Partnership Support)
    - E: [Lewis.Donald@britishfriendly.com](mailto:Lewis.Donald@britishfriendly.com)
    - T: 01234 369165
- Sales - North
  - Emma Vaughan (NAM)
    - E: [e.vaughan@britishfriendly.com](mailto:e.vaughan@britishfriendly.com)
    - M: 07398 175237
  - Katie Perry (Partnership Support)
    - E: [k.perry@britishfriendly.com](mailto:k.perry@britishfriendly.com)
    - T: 01234 369185
- Sales - South
  - Adam Shipton (NAM)
    - E: [a.shipton@britishfriendly.com](mailto:a.shipton@britishfriendly.com)
    - M: 07398 144292
  - Georgia St. Ledger (Partnership Support)
    - E: [g.stledger@britishfriendly.com](mailto:g.stledger@britishfriendly.com)
    - T: 01234 866902
- Member Services
  - E: [enquiries@britishfriendly.com](mailto:enquiries@britishfriendly.com)
  - T: 01234 358 344 option 2
- New Business
  - E: [support@britishfriendly.com](mailto:support@britishfriendly.com)
  - T: 01234 358 344 option 2

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**Sarah**

Self-employed Life Coach  
and British Friendly member

▪ **Useful links:**

- [Adviser Toolkit](#)
- [Mutual Benefits](#)

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# USEFUL INFORMATION

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- Excluded Occupations
- Hazardous Pursuits
- Data Capture form
- Premium Collection Calculator
- Age-costed vs. Level Premium Calculator
- Split Deferred Period Calculator
- Premium Rate Tables (available on request only)



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## ▪ **How do I register an agency?**

- If you would like to register, please send an email to [sales@britishfriendly.com](mailto:sales@britishfriendly.com) including your company name, FCA number, address and contact telephone number.

## ▪ **How do I reset my password?**

- To reset your password please click on 'Forgotten Password or Pin?' underneath the Login Box on <https://advisers.britishfriendly.com/>. Your new password and pin will be emailed to the address that is held on file within 2 hours of submission.

## ▪ **How do I find a saved application?**

- You can retrieve saved applications when logged into your British Friendly account. Simply hover over 'Your Account' and select 'Saved Quotes and Applications (Not Submitted)'.

## ▪ **How can I get an update on my client's application?**

- If you require an update on a recent application please contact our New Business Team on 01234 358 344 option 2. Updates will be available 72 hours after submission.

## ▪ **How do I cancel an application?**

- To cancel an application that is in proposal stage please email [support@britishfriendly.com](mailto:support@britishfriendly.com).

## ▪ **How do I put a policy on risk?**

- To put a policy on risk please contact our New Business Team on 01234 358 344 option 2. Please note that if terms are issued we require verbal confirmation that the client accepts the terms. All terms are published on the documents portal and are available for 30 days. You can also email [support@britishfriendly.com](mailto:support@britishfriendly.com) quoting the client's policy ID, name, postcode and date of birth.

## ▪ **When will I receive commission payments?**

- Commission payments are made once a policy is on risk. Payments are collated weekly, on a Friday. Your statement for the previous week is generated on a Tuesday and payments should be received on the Thursday.

## ▪ **How do I get information updated on an existing policy?**

- To update information on an existing policy please contact our Member Services Team on 01234 358 344 option 2 or via email [enquires@britishfriendly.com](mailto:enquires@britishfriendly.com).



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