

My shield of protection

For completion by adviser to summarise cover discussed and taken out by client(s).

Adviser: Date:

Contact:

Client 1

Client 2

What if I can't work?

Client 1 Client 2

- Income Protection+ Full benefit
- Income Protection+ 2 year benefit
- Living Costs Protection

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

This will pay a monthly cash sum to replace a proportion of lost income if you can't work due to injury or illness. This money could help cover monthly outgoings and help maintain your lifestyle.

Notes: Add info e.g. benefit amount, deferred period, increasing or level cover etc. here.

What if I'm critically ill?

Client 1 Client 2

- Critical Illness+
- Adult's Upgrade
- Children's Upgrade
- Extra Care Cover
- Life Insurance+ with critical illness

<input type="checkbox"/>	<input type="checkbox"/>

This will pay a cash sum if you make a successful claim for one of the named critical illness definitions covered by the plan.

This money could help pay off your mortgage or other debts, pay for changes to your home or provide a cash buffer whilst you're ill.

Notes: Add info e.g. term, cover amount, level/decreasing/increasing/family income cover, total permanent disability or waiver of premium included etc. here.

What if I die?

Client 1 Client 2

- Life Insurance+

<input type="checkbox"/>	<input type="checkbox"/>
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This will pay out a cash lump sum to your family or estate if you die. This money could help pay off outstanding debts or cover future expenses.

Notes: Add info e.g. term, cover amount, level/decreasing/increasing/family income cover, total permanent disability or waiver of premium included etc. here.

Additional add-ons

Client 1 Client 2

- Global Treatment
- Fracture Cover

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Global Treatment is provided in conjunction with Further Underwriting International SLU.

This pays you a lump sum if you suffer one of the covered fractures.

Notes: Add info here.

Health and wellbeing support

Client 1 Client 2

- Aviva DigiCare+

<input type="checkbox"/>	<input type="checkbox"/>
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Me and my family get access to these services as soon as my cover starts.

These services are non-contractual and may be changed or withdrawn at any time.

Notes: Add info here.

Refer to the policy conditions for full details on the cover you have put in place and information on how the products work. These products have no cash-in value at any time.

It's important to review my protection needs regularly to reflect the changes that happen in life. My next protection review should take place:

If my circumstances change or I have any questions before this next review, I should contact my adviser.

My shield of protection

My shield of protection is all about protecting the things that matter most to me. I can use this page to make a note of why I've taken out the cover I've chosen and what it'll mean for me and my loved ones.

If I can't work, I've put income protection in place to...

If I'm critically ill, I've put critical illness cover in place to...

If I die, I've put life insurance in place to...

I've put Global Treatment in place to...

I've put Fracture Cover in place to...

I can use Aviva DigiCare+ to...

| Retirement | Investments | Insurance | Health |

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