

Enhancing Client Engagement with a Protection Referral Service



Caspian Insurance

Endorsed Partnership – Delivering exceptional customer outcomes



"Referring these clients to Caspian compliments my business and my own expertise in mortgages. It allows clients access to a team of dedicated and knowledgeable advisers who solely focus on protection."

"I am keeping my compliance up, treating my clients fairly, all with Caspian doing the work and still receiving the additional revenue for my business"



"It's time saving for me, and I know my clients are getting help from experienced advisers who are experts in their field."

"Caspian have supported me to build my knowledge base, identify opportunities and ask the relevant questions at the appropriate time with client-focussed prompts to ensure that the client's need is prioritised."



"There have been cases where clients have had recent medical claims or historical medical conditions where I wouldn't know where to turn, Laura and her team were able to find cover at competitive prices"

Create a process and stick to it

1

At outset

2

Gentle
reminders
throughout

3

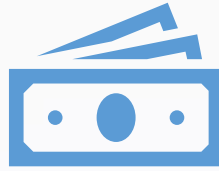
Refer at offer
stage



Protecting Assets



**Review Financial
Situation**



**Spend Time on
the value**



'What If?'

Comprehensive support



Refer easily to Caspian for seamless case management, updates and transparency



Generous commission split with no risk of claw back

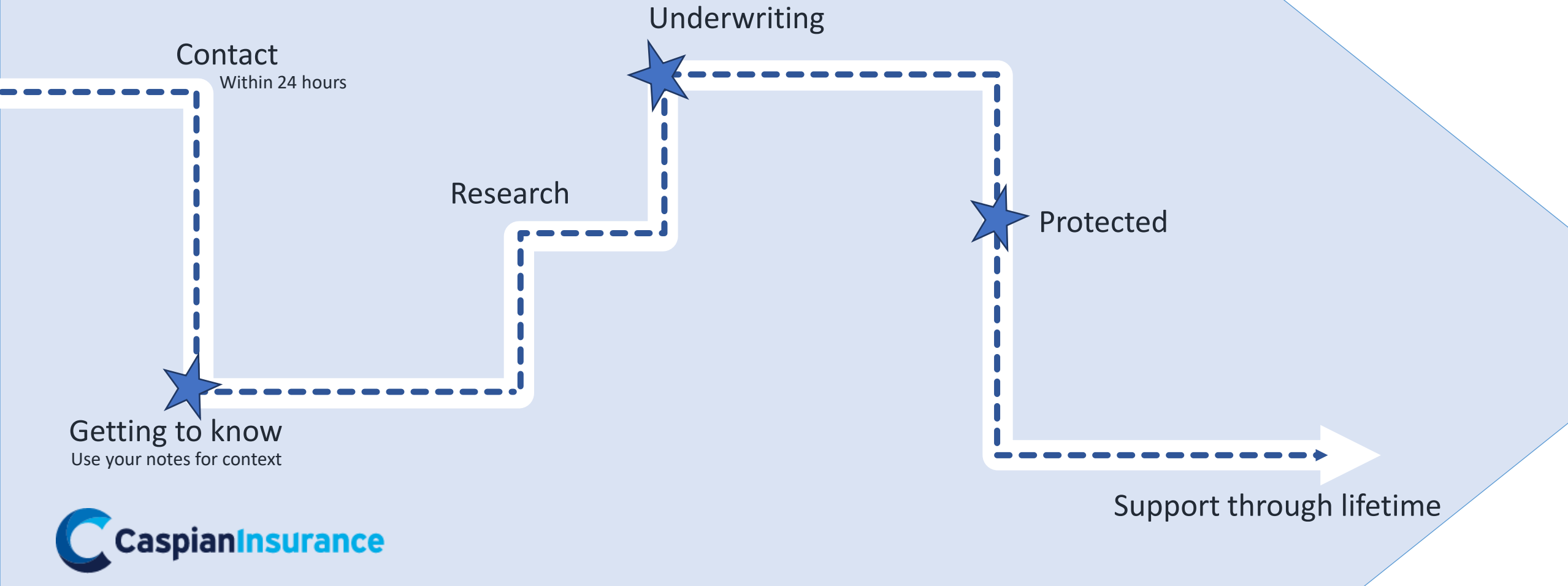


Tailored underwriting packages meet unique client needs designed with HNW and business clients in mind.



Access to expert knowledge and thorough market research supports informed decision-making.

A Customer Journey



Areas of Expertise

Personal and Family Protection

- Mortgage Protection
- Critical illness cover
- Income protection
- Family Protection
- Whole of life
- Over 50's cover

Business Protection

- Relevant life cover
- Keyperson cover
- Shareholder protection
- Business loan protection



Your Protection Referral Partner



Referral Service by Caspian

- Manage client cases from start to finish
- Allows you to focus on core business areas



First-Class Service Assurance

- Clients receive excellent service
- 5-star reputation on Trustpilot



Leading Life Insurance Broker

- Over 200 years of combined industry experience



Thank You

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