

Endorsed Protection Solutions
for your clients



Caspian Insurance

Endorsed Partnership

Over 8,500 5* Trust Pilot reviews

Over 2,000 families' have had access to quality advice

Over £390 million cover arranged

Average 2.4 policies sold per client

Non – Indemnity Model

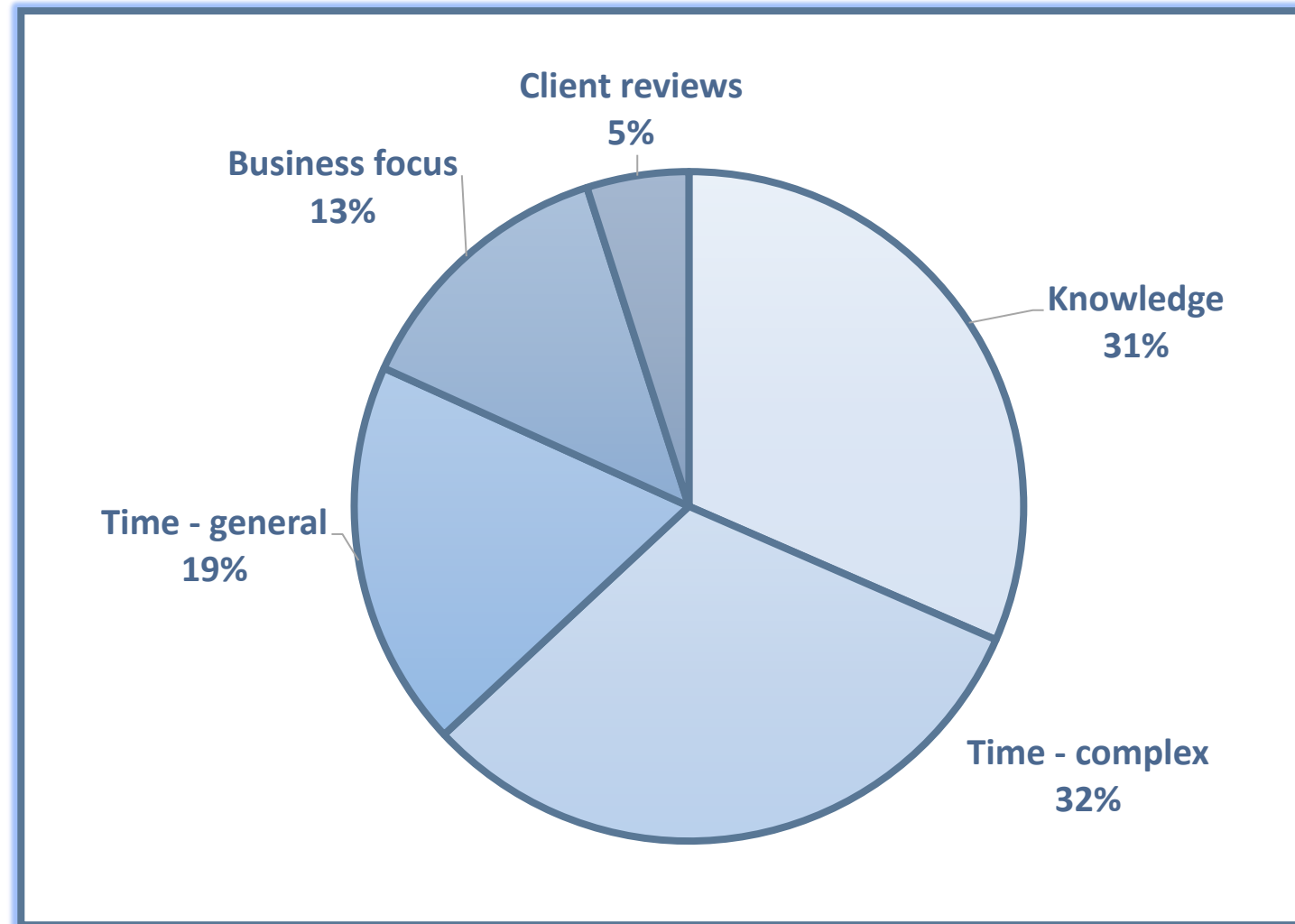


Made to feel at ease, the whole experience was very informative and felt that the cover I got was tailor made

- Diane



Why do people refer?



Simplybiz testimonials



I would like to take this opportunity to thank you and your team for all the hard work and effort you have put in to finding a home for my clients. The easy-to-use portal also makes life easy and enables me to keep up to date with how all my clients are getting on as well as knowing what cover/ protection they have taken out. This helps me when completing the compliance element of all my files

All the clients are super happy with the service you provide as well as your in-depth knowledge, which comes from the experience within the firm.

Minesh S



I started to use Caspian for all my insurance enquiries about 6 months ago as I didn't have time to look at these queries myself. I have found the portal easy to use when uploading client details and from that point onwards Caspian deals with the client. The client is usually called within 24 hrs and each client that gets a call has been impressed with their knowledge and the different options have been explained in a clear and concise fashion. I get regular updates to let me know what is happening with each enquiry and how things progress with each client. I have recommended Caspian to other advisers and both myself and my clients are very happy with the service they provide.

Jason H



Core areas of advice



Families and Mortgage Clients

Review clients/Existing Clients

Business Owners

Caspian Plus⁺



Partner Portal



Welcome, Simplybiz

Welcome to our Partner Portal.

Here you can refer customers to Caspian Insurance yourself or create a white labelled form to send to your customers to complete. You can track your customers' progress in our pipeline by viewing the sales overview as well as viewing your commission (coming soon) and conversion rate.

Overview



Referrals

View your referral options



Sales

Commission: 0.00



Users

Not Registered: 0



Commission

Next Payment Date: Wed Feb 15 2023



Partner Portal

Your Referrals,

Search

Start Date

End Date

Filter by Status

- Sold
- Contact Ongoing
- Accepted
- Cancelled
- Application
- Attempting Contact
- Not Proceeding

Filter by Source

CUSTOMER	PAYMENTS:	STATUS	CREATED AT	SOLD AT	ACTIONS	NOTES
Full Name: Mr and Mrs Smith ID: 300000	Monthly Premium: £36.90	Sold	10/06/2024	13/06/2024		View Notes
Full Name: Mr and Mrs Smith ID: 300000	Monthly Premium: £254.94	Sold	08/07/2024	16/09/2024		View Notes
Full Name: Mr and Mrs Smith ID: 300000	Monthly Premium: £51.80	Sold	12/07/2024	12/07/2024		View Notes
Full Name: Mr and Mrs Smith ID: 300000	Monthly Premium: £0.00	Not Proceeding	18/07/2024			View Notes
Full Name: Mr and Mrs Smith ID: 300000	Monthly Premium: £74.44	Sold	23/07/2024	24/07/2024		View Notes
Full Name: Mr and Mrs Smith ID: 300000	Monthly Premium: £0.00	Attempting Contact	16/08/2024			View Notes

Our Promise to you



No cross sell



Your client remains your client



Full transparency



Non-Contractual Agreement



Support

Protection reporting

Example of a good customer outcome

Cross-selling ratio for protection policies with mortgages (protection penetration rates)

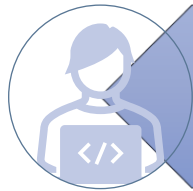
Clients are contacted when a better quality product comes on the market e.g. protection/equity release

We check ongoing services are delivered

Persistency rates for protection / GI policies

Customers are signposted to third party referral services if we cannot support directly

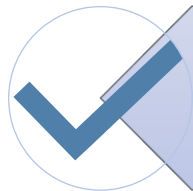
Interested? Next steps....



Register For Portal



Partner Agreement



Ready to Refer

KH Kelly Harber
9 reviews 📍 GB

★★★★★ Verified 9 hours ago

Neil was so helpful and didn't put any...

Neil was so helpful and didn't put any hard pressure on us. It was a great appointment and we are now reassured on our protection and protecting each other and our children. Highly recommend Caspian and Neil for being so great 😊 thank you

Date of experience: 10 January 2024

👍 Useful 🔗 Share

Laura Havenhand

Laura.havenhand@caspianinsurance.co.uk

07388 857645

Rachel Kelly

rachel.kelly@caspianinsurance.co.uk

07385 401581