BROKER **ELEVATE**

Welcome to our Broker Elevate Community

Accelerating growth through closer partnerships

	Entry	Kickstart Kickstarting our relationship	Bronze Our Bronze value added package is designed to build relationships	Silver Our Silver package encourages growth with access to training opportunities	Gold This package has been designed to give you a range of tools to help you take a wider view of your business and help accelerate the growth of your business	Platinum The Platinum package helps you to identify areas for growth and improvemement in your business which can elevate performance, increase business and maintain and improve client retention
Account Management	Telephone Account Manager (large broker panel)	Telephone Account Manager (small broker panel)	Telephone Account Manager (large broker panel)	Telephone Account Manager (medium broker panel)	Account Manager (small broker panel)	External Account Manager (small broker panel)
Service Expectation	▪ Telephone Account Manager (Large broker panel) ▪ Supplemented by digital marketing	▪ Early engagement and proactive onboarding process ▪ Available to support you when you need us ▪ Supplemented by digital marketing ▪ Quarterly Business Review to share performance and improve how we work together ▪ Working together to retain cases and target new opportunities ▪ Proactive pipeline management	ENTRY EXPECTATIONS PLUS: ▪ Half-yearly Business Review to share performance and improve how we work together ▪ Working together to retain cases and target new opportunities ▪ Support with accessing Bronze value add benefits	BRONZE EXPECTATIONS PLUS: ▪ Opportunity to work together to create a joined-up business plan ▪ Quarterly Business Review to share performance and improve how we work together ▪ Large case and sales pipeline management ▪ Support with accessing Silver value add benefits	SILVER EXPECTATIONS PLUS: ▪ Regular contact to manage individual requirements and share AXA appetite ▪ Bespoke contact strategy agreed with you, to include face to face visits where required ▪ Access to Branch Senior Management Team where required ▪ Support with accessing Gold value add benefits	GOLD EXPECTATIONS PLUS: ▪ Diarised, regular face to face visits ▪ Exclusives agreed within 48 hours subject to trade / appetite ▪ Support with accessing Platinum value add benefits
Deal	N/A	N/A	N/A	Profit share	Variable profit share	Bespoke deal
Conditions	N/A	N/A	N/A	▪ Each year we will look to offer a deal that rewards partnership and profitable long-term growth. ▪ Qualifying criteria will apply.	▪ Each year we will look to offer a deal that rewards partnership and profitable long-term growth. ▪ Qualifying criteria will apply.	▪ Bespoke deals reviewed annually based on book performance and planned growth. ▪ Qualifying criteria will apply.
Value Added Benefits	▪ Discover over 100 learning modules on Brokerwise, our personal development platform ★ Learn online with any of our **50 live learning courses** throughout the year ★ Apply for your **Brokerwise Passport**, our training portal designed for new entrants into the insurance industry	▪ Discover over 100 learning modules on Brokerwise, our personal development platform ▪ Invitation to Broker Elevate events ▪ Learn online with any of our 50 live learning courses throughout the year	ENTRY BENEFITS PLUS: ▪ Invitations to general, regulatory and rradar webinars	BRONZE BENEFITS PLUS: ★ Preferential rates for our market-leading MLP product ▪ Touch points from Branch Leadership team	SILVER BENEFITS PLUS: ▪ Complimentary access to our customer profiling tool, **endcustomer.co.uk** (5 Users with 300 reports a months)* *access for the calendar year only	GOLD BENEFITS PLUS: ★ Dedicated Claims Relationship Manager for Mid-Market cases over £100,000 ★ Application to our annual AXA Broker Leader programme ★ Application to AXA Together, our talent and recognition programme ▪ Invites to technical experience events

★ = New for 2024

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