

AXA Schemes Journey

Partnering for growth

We know that sometimes it's difficult to understand how the process works when 2 commission models are available, so we've outlined the broker journey to guide you through the process.

From filling in our Quick Fact Find on axaconnect.co.uk/schemes to choosing which model is right for you, we'll be transparent about what you can expect every step of the way.

Broker contacted by the ASH/AM, taken through their options. It's at this stage that the broker chooses Deal 1 (Traditional) or Deal 2 (AXA Growth).

For brokers who choose New Growth Deal (Deal 2) a Growth lab with Ignition is set up. Following this a joint Growth plan is produced.

Broker/AM completes the QFF on the AXA Connect Schemes page. This is submitted to the Schemes mailbox or preferred AXA representative.

Broker with help from ASH/AM fills in DFF document and returns with relevant information to the Schemes mailbox.

If broker chooses Deal 1 (Traditional) they go directly to proposal meeting

Broker accepts AXA proposal and an implementation plan is drawn up.

ASH/AM meets with broker to talk about the AXA proposition and introduce Detailed Fact Find (DFF).

Proposal meeting/tender/sales pitch to include ASH/AM.

AXA Schemes hub (ASH) review QFF and broker receives decision on whether we want to pursue a piece of business within 48 hours.

Once scheme is live, regular reviews in diary. Growth plan tracked and actioned where Deal 2 in play.

Proceed to implementation of scheme.

