



Quick Fact Find

Name

Phone

Email

Is this an existing or new scheme? If existing, who is the current carrier and how long has the scheme been established?

What are the key benefits this scheme will deliver for prospective customers?

- ☐ Competitive pricing
- ☐ More tailored cover
- ☐ Simplified purchase process
- ☐ Enhanced customer service
- ☐ Greater value-added services
- ☐ Superior levels of relationship management

- ☐ Financial security and credentials of supplier
- ☐ Other:

What is the GWP value of the deal?

Do you currently have any Delegated Authority?
If so, is this in terms of pricing, underwriting or claims?

What is the renewal date for this scheme?

How will this scheme be transacted?
e.g. electronically or manually?

Please provide the performance history for the last 3 years.

What are your remuneration expectations?

Can you specify the type of business this scheme will cover, including trades and products?

Please provide contact details for the main point of contact for this scheme.