

GETTING THE MOST OUT OF GI

Stage 1

INITIAL SET UP AT MORTGAGE STAGE

A good positioning statement from the Adviser completing the mortgage application is required it should ensure the customer very clearly understands both competitive pricing and top quality products are available.

It should be stated that Buildings Insurance is a condition of the mortgage offer and that contact will be made to discuss insurance solutions specifically at the offer stage.

THE SUGGESTED CONVERSATION

Thanks for completing the mortgage application process. I'm going to submit this today and keep you regularly up to date with the process until we receive your mortgage offer. At that stage I will call you to confirm the actual mortgage offer details are exactly as I've outlined today. One of the mortgage conditions will state Buildings Insurance must be in place and this is usually expensive if taken out directly with the lender. I will therefore use the information you have provided today to ensure a comprehensive quote can be provided.

Stage 2

MORTGAGE OFFER APPROVED

The client gets a call from their Adviser to confirm the good news, and at this stage the quote for insurance is completed on the Uinsure system.

To assist in the sale print a Defaqto Compare page which shows differences of cover versus other insurance quotes the client may have received.

THE SUGGESTED CONVERSATION

With the mortgage offer now accepted you need to consider the Buildings (& Contents) Insurance arrangement for the property. I can confirm cover is available via Uinsure and the excellent news is premium is £Y. This premium is £XX monthly cheaper than your current payment and importantly offers the following additional benefits".

Make sure you're got the differences from the Defaqto compare page pre-prepared & read them out.

If the customer requires any changes to the cover simply login to Uinsure system, retrieve quotation and edit to suit needs.

Confirm cover will be set up on the agreed start date, enter bank details and insert email address address so documents can immediately be supplied to the client.

Got a question?

We're here to help you!



0344 844 3844



enquiries@uinsure.co.uk

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