



How to talk GI when talking remortgages with your clients

A step by step guide



Step 1

Start your remortgage conversation by **setting your clients' expectations that you will be reviewing their insurance needs.**

Let's begin by reviewing your insurance to make sure it still fits your current needs perfectly.



Step 2

Encourage your client to **fill out the provided questionnaire** to detail their current insurance providers, which will allow for a comprehensive review.

[Download questionnaire](#)

Step 3

Using the [Comparison Tool](#), bring up the comparison between both providers.

Step 3

With the [Sales Aid](#), match the client's responses to the prompts provided to highlight any gaps in their current insurance coverage.

Step 4

Identify any coverage gaps with the comparison results and **discuss these with your client** to explain the benefits of switching insurers.

Step 4

Discuss significant life events captured in the questionnaire and their impact on the client's insurance needs, suggesting tailored insurance options.

Step 5

Use this **recommendation** for the basis of reviewing their cover in more detail:

Would it be possible for me to see your current insurance schedule in order to complete the review?



Step 6

Use the **insurance schedule** to confirm coverage gaps and recommend solutions, addressing other potential improvements like excess fees or missing add-ons.

Step 7

Offer to complete the process, which will include cancellation of the existing policy and processing the new one.

