

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 3

Using the Comparison
Tool, bring up the
comparison between
both providers.

Step 2

provided questionnaire

Encourage your

Download

questionnaire

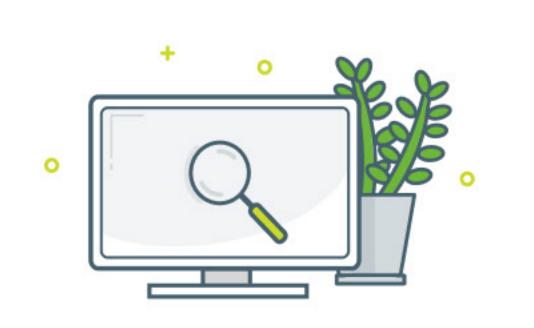
client to fill out the

to detail their current

which will allow for a

comprehensive review.

insurance providers,



Step 4

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

Step 5

Use this recommendation for the basis of reviewing their cover

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.



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

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



