



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 cover, product name and provider which will allow for a comprehensive review.

[Download questionnaire](#)

Step 3

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



Step 7

If your client agrees, **offer to set up a new policy** based on your recommendations.

