THE INSURANCE GROUP LTD
INNOVATIVE INSURANCE SOLUTIONS

Client Service Standards Statement

Our commitment:

To provide Financial Advice for Insurance Products to our Clients in accordance with the Standards for the Code of Professional Conduct for Financial Advice Services for Ethical Behaviour, Conduct and Client Care.

1. Treat Clients Fairly

Listen to your request and determine your needs while considering your views and concerns carefully.

2. Act with Integrity

1. We will always recommend products that are fit for purpose to meet your needs.

2. We will not seek to upsell products or sell products that are not required.

3. Give Advice that is suitable

a) Providing suitable cost-effective options and taking time to explain why the product is best for you and meets your needs.

b) Ensure that the Client understands the Financial Advice

c) Clear communication and making sure you understand the policy cover and any specific limitations.

d) We will provide policy wordings and other information to help you understand the policy terms and conditions. We will also provide our disclosure statement.

4. Protect Client Information

a) We will protect your information as per our Privacy Act statement.

b) We will ensure it is kept confidential either in the physical client file or on our computer system.