

Becoming an Appointed Representative

At CLEAR we have a simple approach to firms wishing to become our Appointed Representative - to get close to you and make the process easy.

We follow a few straightforward steps.

Getting started

First, we get to know your business. What insurance activities do you wish to undertake? Are the activities regulated? Is AR status the best option?

Then we'll want to get to know you better. This means carrying out some due diligence. We'll go through our application form with you, gather some financial information, run some credit checks and make sure you're generally in good standing. We'll also need to find out how you operate, what sort of clients you have, what insurances you transact, what arrangements are in place for collecting premiums and so on.

We'll also review how you communicate and what you tell your clients about their insurance.

Signing Up

All being well the next step is the essential paperwork. We'll formalise our arrangements in a brief legal agreement and deal with the FSA's requirements.

Getting it Right

The next step is to help bring about the changes needed to run a compliant business. Drawing on the due diligence, we'll put a plan together. We'll help you create the right client documentation, develop workable procedures that will help you get it right and provide valuable training for you and your staff. We're then available whenever you need us to resolve those sticky insurance issues.

We've done this many times before so we know what we're doing.

Staying on track

We don't just leave you to it. We stay with you, in regular contact, helping where we can to make sure the changes are working and ensure that you can demonstrate compliance with the FCA's rules if ever asked to do so.

If this sounds sensible to you, then we'd like to hear from you. To take the next steps please contact Kevin Donegan on 020 7280 3494 or email kevin.donegan@thecleargroup.com