

The natural choice  
for friendly, expert  
advice on insurance  
and financial services



## Welcome

As an insurance and financial planning group with more than 30 years' experience, our longevity and reputation are the result of doing things a little differently – of going the extra mile for you, for our people and for our communities.

Alongside insurance and financial advice, we provide a distinct range of additional services, so you can get everything you need in one place.

This brochure will guide you through how we work and introduce the people committed to providing expert advice, presenting our ever-evolving range of products and services along the way.

**Gold**  
**Trusted**  
**Service**

2017

★★★★★  
feefo



## Chairman's message

When we started the business more than 30 years ago, we had one core focus: to provide personal, straightforward advice to all our clients.

We must have done something right, because word got around and the business has grown ever since.

And although more than three decades have passed, nothing has changed; I expect every member of the team to treat our clients in the same way we always have – by providing expert, friendly advice every time.

I hope you find this brochure useful, but I would very much encourage you to talk to us – for as long as you like, about whatever you like.

**Alan Boswell**  
Executive Chairman

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## About us

We are the people our clients turn to for support and guidance at every milestone

With nine offices and more than 300 members of staff, we're ideally placed to ensure you and your business receive expert advice whenever you need it.

As well as arranging both personal and commercial insurance, we also have an ever-evolving portfolio of added-value services, including underwriting, delegated claims handling, loss assessment, risk management, specialist equipment inspection and health and safety consultation.

Our financial planning teams can also provide ongoing advice and support on a range of employee benefits for businesses – while our personal finance experts can give guidance on your savings and investments, retirement plans or market updates.

Whether you use our services in isolation or as part of a package, you are guaranteed to receive the same high standards, every time.



## Our people

Our reputation and status as one of the UK's largest independent insurance brokers and financial planning groups is maintained by our people.

From our graduates and apprentices to our directors and specialists, we ensure that we attract and retain the best and brightest talent.

We look after our people by providing a friendly, professional environment in which they feel valued and supported. We encourage them to train, develop and grow with us. We do this so they can put their expertise, experience and enthusiasm into looking after you.



## Our values

- **Pride:** We are passionate in what we do and proud of our reputation.
- **Integrity and honesty:** We respect and trust all, act responsibly and behave ethically, with professional integrity.
- **Our service:** We make an effort to understand our customers, enabling us to add value and provide a superior service.
- **Working together:** We are working together towards a common goal and take ownership and accountability for the role we fulfil.
- **Achieving results:** We aim for success in everything we do.
- **Creativity:** We continually work towards improving and developing what we do to optimise growth and build on our successes.





## Business insurance services

We take an intelligent, consultative approach to you and your assets. We don't just match you to the closest product and price; we tailor solutions that fit your unique requirements.

We are renowned for our attention to detail and our positive, longstanding relationships with insurers, which help us create quicker, more efficient processes for you.

Our aim is to provide you with both the convenience and reassurance that comes from having a comprehensive team handling all aspects of your insurance needs. That's why we made the decision to bring crucial skills in-house – from delegated claims handling to health and safety consultation and equipment inspection.

Providing you with superior insurance services is at the heart of what we do. That was our aim when the firm was established more than 30 years ago and is reflected in the credentials, accreditations and awards we hold today.

The breadth of our expertise is demonstrated by our people, who will support you with friendly, specialist advice whenever you need it. Our nationwide reputation, client testimonials and recommendations are further evidence of the high level of service you can expect from us.

We don't just match you to the closest product and price; we tailor solutions that fit your requirements

“ Having arranged insurance and risk management services with Alan Boswell Group for a number of years, I trust that my business is covered for every eventuality ”

John Potter,  
Potters Resort

Our commercial insurance specialisms include:

- Agriculture
- Property
- Construction
- Renewable energy
- Leisure & Hospitality
- Professional risks
- Care & Medical
- Credit
- Science & Technology





## Risk management

Our risk management services will not only help you to better understand the risks you face, but, in many cases, how to manage and mitigate them too. We want you to benefit from our experience and reduce the risks you face.

We provide related services in this area too, including health and safety consultation and engineering inspection from our dedicated surveyors. Our aim is to ensure your business remains compliant with current legislation at all times and benefits from ongoing advice and reassurance.

Like all of our support services, risk management can be provided in a standalone capacity or as part of a package. So whether you simply need annual equipment inspections, or require a full risk assessment and management programme, we will be happy to work with you.

// We take pride in getting to know our customers – from their sites and their equipment to their customers – so we can deliver a truly bespoke service //

Gary Murphy,  
Engineering Surveyor

We provide support and advice in the following areas:

- Risk assessments
- Business continuity planning and support
- Engineering inspection
- Health and safety compliance auditing
- Fire safety management



// No other company offers the same first-class levels of service or cover as Alan Boswell Group – we wouldn't dream of using anybody else //

Daniel Thwaites,  
Barnes Brinkcraft



## Going the extra mile

### Delegated claims

Thanks to longstanding relationships with insurers, we often have delegated claims authority, which means insurers trust us to manage and settle claims on their behalf. That means you have one point of contact and quicker decisions when it counts.

Our claims managers have previous experience of working with major insurers, giving them valuable insight into the claims process, allowing them to bring your case to the best possible conclusion.

Where appropriate, we can arrange site visits and repair work via our pool of trusted suppliers and contractors, saving you further time and unwanted hassle.

Some of the ways you will benefit from this service include:

- Early intervention when losses occur
- Access to your own expert claims handler
- Arrangements for repair work
- Site visits

Even if your claim falls outside our delegated claims authority, we will guide and support you through the entire process.

### Underwriting

We have always taken an individual approach to our clients because we know one size rarely fits all.

Our in-house underwriting team takes this tailored, attention to detail even further. They use their expertise to create unique policies with bespoke covers that benefit our clients – so you get exactly the right insurance for your needs.

**Our underwriting service allows us to devise, design and price products precisely tailored to protect you**



## Private clients

Our industry awards and accreditations tell everyone what sort of firm we are, but it is the individual care our clients receive that tells them what sort of people we are

Many of our corporate clients become private clients and vice versa. We think this says a lot about the level of trust that our expert advisers earn.

We can arrange all types of personal insurance for you, from car and landlord insurance, to specialist cover for high-value homes and boats.

In fact, we know that off-the-shelf products are often unsuitable, so we provide a personal service and tailored solutions. We can arrange independent valuations and ensure that valuable items, including antiques and fine art, are fully covered.

But it's not just about insurance for your possessions. We can review your health, life and private medical cover to ensure that you and your loved ones have access to the best treatments if the worst happens.

Whatever your requirements, you'll have access to a dedicated contact who can provide ongoing insurance advice and support whenever you need it.

As a reflection of this, we have been presented with a Gold-Trusted Service Award by independent review site Feefo, having consistently achieved outstanding customer service scores.

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It's important that no one on the team would over-promise and under-deliver. If we promise to do something, we'll make sure we achieve it //

Mark Linehan,  
Account Executive

2017  
**Trusted  
Service  
Awards**  
★★★★★  
feefo





“ We take the time to build strong relationships with clients. They trust and respect what we do ”

Richard Escott,  
Senior Financial Adviser

## Financial planning

Giving you the reassurance of working with friendly experts whose clear, intelligent advice puts you in control of your future

Financial planning is a fast-moving sector that often seems daunting and unpredictable. Having access to independent financial advice will help you gain clarity and achieve your goals.

For more than a decade, our team of expert consultants have combined their impressive experience – gained at organisations including AXA, Eversheds, KPMG and Aviva – with their understanding of our clients’ situations to provide straightforward, jargon-free recommendations.

We can provide guidance on a diverse array of topics, including investments, savings, pensions, life insurance, private medical insurance, income protection, long-term care and critical illness cover.

We also take pride in the fact that our fees and processes are completely transparent, so there are no unexpected surprises along the way.

We can provide advice on a range of subjects, including:

- Investments
- Pensions and retirement
- Life insurance
- Private medical insurance
- Critical illness cover





## Employee benefits

From auto-enrolment pensions to group private medical insurance, we ensure that you find the right solution to motivate your workforce

Employee benefits are an excellent and cost-effective way to attract, retain, motivate and reward your workforce.

Our dedicated employee benefits team provides ongoing support to a range of businesses, from start-ups and small businesses, to expanding organisations and multinational corporations.

Whether you need to decipher the vast number of pension options on offer, or are considering taking out group private medical insurance, we can help you create innovative packages tailored to your employees' needs.

### We provide tailored, innovative packages for companies:

- Workplace pensions
- Death in service
- Group income protection
- Group medical insurance
- Key man cover



With so many options available, employee benefits can seem complicated. We can help you make the right choice for your team



Neil Marsden,  
Financial Planner



## Our community

**Norfolk's  
Cancer Charity**  
Since 1980



It's great to work for a company that takes an active role in the community. There's always something to get involved with

Kathryn Jervis  
Team Leader, Property Owners

We pride ourselves on providing a supportive environment in which to work, and this care extends to our communities and beyond.

We're not interested in ticking boxes, it's just the way that we believe a firm like ours should conduct itself.

For more than 30 years our generous employees have raised thousands of pounds for charities of all types across the UK, including British Heart

Foundation, Break, East Anglian Children's Hospice, Macmillan and Nene Valley Railway. We are proud of them, to say the least.

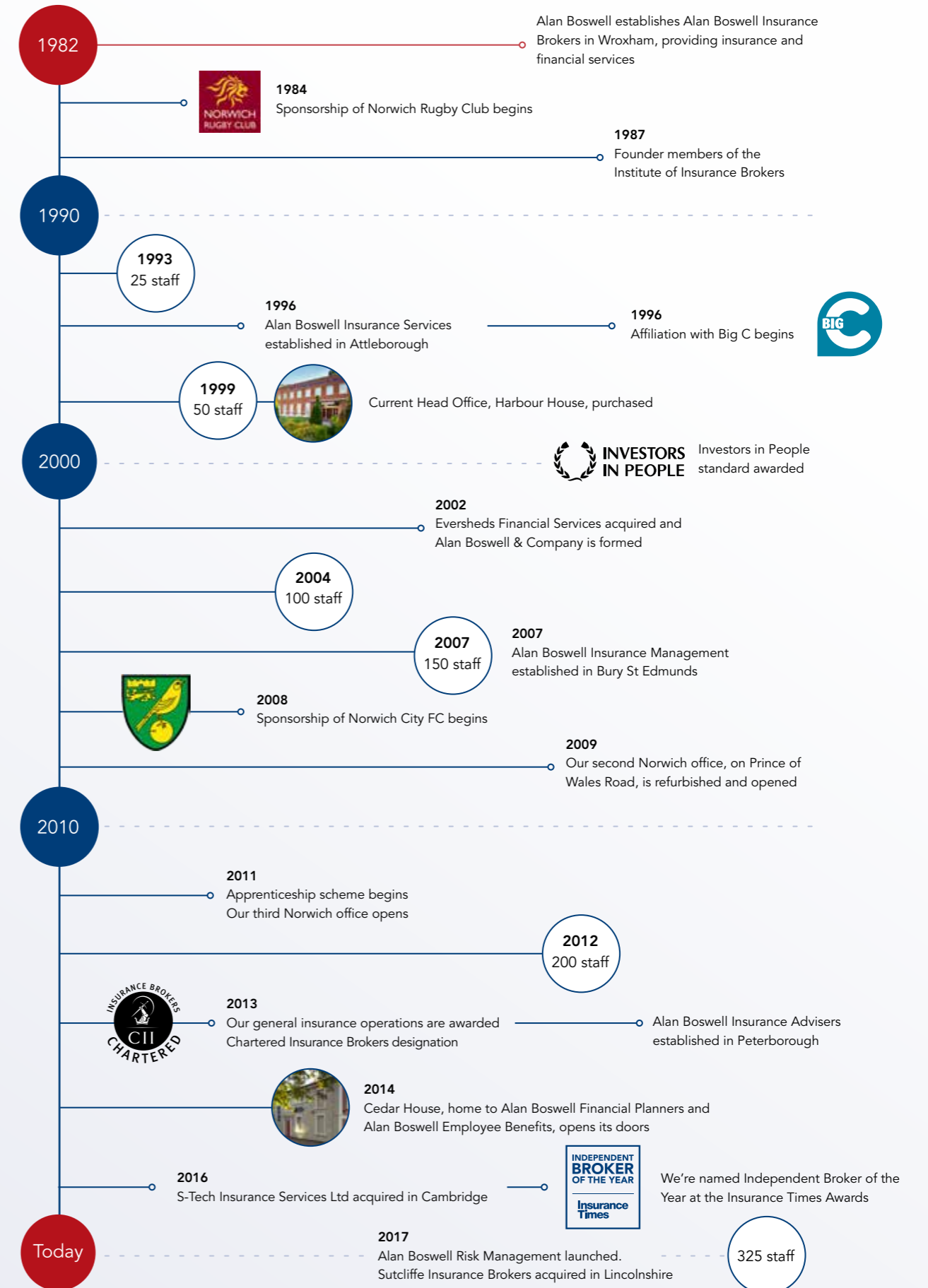
We have a 20-year affiliation with cancer charity Big C and through many years of head-shaving, bike-riding, cake-baking and more, we have helped them to raise vital funds, which has allowed them to conduct vital research and provide support to people affected by cancer. In fact, we raised in excess of £33,000 for them in 2016 alone.

And like many proud East Anglians, we're keen to support thriving local organisations.

We are corporate sponsors of Norfolk Wildlife Trust, Norwich Theatre Royal, Norwich City Football Club, Norwich Rugby Club, Bury Rugby Club, The Cambridgeshire Women & Girls' County Football League, Peterborough Arena, Horsford and Brooke Cricket Clubs.

As we continue to grow, so will our support for our communities.

## Our history





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Don't hesitate to give us a call whenever you have a question about insurance or financial services. We're happy to help however we can

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Alan Boswell,  
Executive Chairman

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