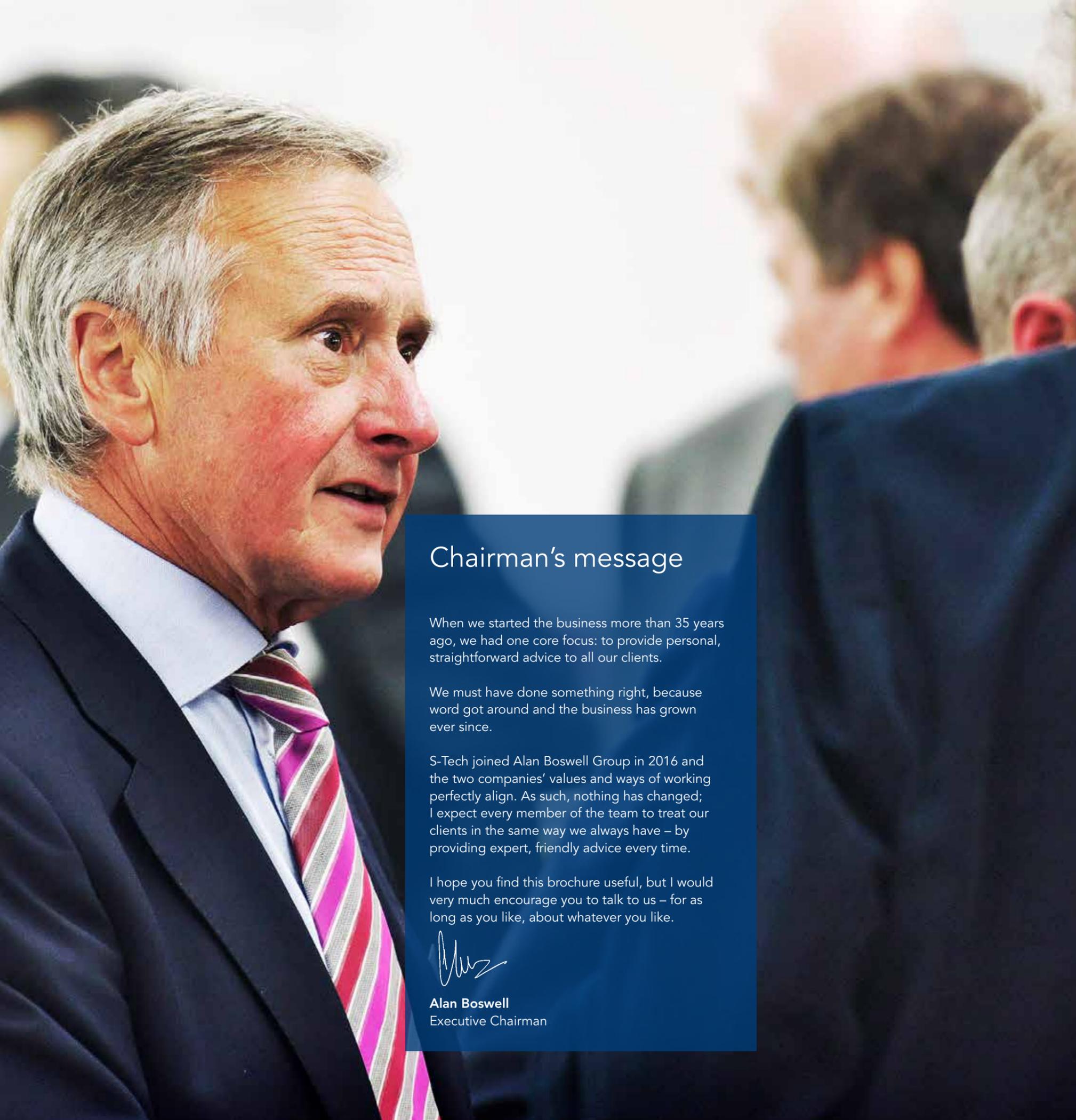


The natural choice
for friendly, expert
advice on insurance
and financial services





Chairman's message

When we started the business more than 35 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.

S-Tech joined Alan Boswell Group in 2016 and the two companies' values and ways of working perfectly align. As such, 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

Welcome

As an independent insurance broker with more than 35 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, we provide a distinct range of additional services, including financial advice and risk management, 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.



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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 provide ongoing advice and support on a range of employee benefits for businesses, and also personal advice on your protection, savings, investments and retirement needs.

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 35 years ago and is reflected in the credentials and accreditations 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 reputation and client testimonials 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

Our commercial insurance specialisms include:

- Credit
- Technology
- Life sciences
- Research and development
- Museums and galleries
- Construction
- Agriculture
- Business interruption
- Start-ups

// S-Tech is an integral and crucial part of our business. First-class service comes as standard throughout the company //

Phillip Prior
Adcock Refrigeration & Air Conditioning



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

// Always a really friendly voice on the phone, with excellent advice //

Martin Cartwright,
Raspberry Pi



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. As a result, you will have one point of contact and quicker decisions when it counts.

Our claims team has 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 can provide the flexibility to tailor policies that meet your needs



Private clients

Our 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.

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We're committed to providing outstanding service to all of our clients. We're always looking to go the extra mile

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Lucy Frost
Claims Department Manager



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

Richard Escott,
Senior Financial Adviser

Financial planning

For you

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, the team of expert consultants at Alan Boswell Financial Planners have combined their impressive experience – gained at organisations including AXA, Eversheds, KPMG and Aviva – with their understanding of their clients’ situations to provide straightforward, jargon-free recommendations.

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

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

For your business

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

The Alan Boswell 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 can provide advice on a range of subjects, including:

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

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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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An Alan Boswell Group company