



Discover schemes
built around
your clients

For broker use only

Proudly part of the BENEFACT GROUP 

We provide more than just an insurance policy. We do things differently.

Our Blueprint for a successful scheme

As a pioneering insurer of schemes, with 30 plus years of experience and over 80 live schemes and growing, we've learnt a huge amount about what makes a scheme a success. It all comes down to a broad risk appetite, flexibility, collaboration, strong relationships and proactive management. These elements all contribute to getting you from an opportunity to a thriving scheme with assurance and speed.

A clear focus

Our schemes appetite extends far beyond what you might think. Funeral directors, horse trailers, musical instruments, dental laboratories, specialist personal lines and residential park homes are just a handful of the schemes we currently have in our portfolio. So if you have an existing scheme that could really blossom with the right support, you might be surprised by our appetite to discuss proposals.

- ◆ The breadth of our schemes experience has enabled us to establish a blueprint approach that maximises each scheme's potential
- ◆ Our Delegated Authority (DA) is broad. Where we have a DA arrangement, an average 90% of the decision making sits with the broker. After all, you are the experts in your field
- ◆ You'll have the support of a specialist team that are dedicated solely to serving the particular needs of your scheme
- ◆ We know the right things to focus on. A dedicated relationship manager and underwriter who know your scheme inside and out, and will actively find ways to support and grow your scheme
- ◆ We'll work with you to create bespoke covers. We don't rely on an off-the-shelf solution
- ◆ We're in this for the long term – we've supported some schemes for over 30 years.

"Ecclesiastical has supported Boshers for over 30 years in developing a tailored schemes solution for our clients. Having developed a solid business partnership, they have shown a real desire to develop our proposition, joint business plans, regular reviews, marketing support and guidance delivering a first class service in all aspects of running a bespoke scheme."

Boshers
A partner for over 30 years

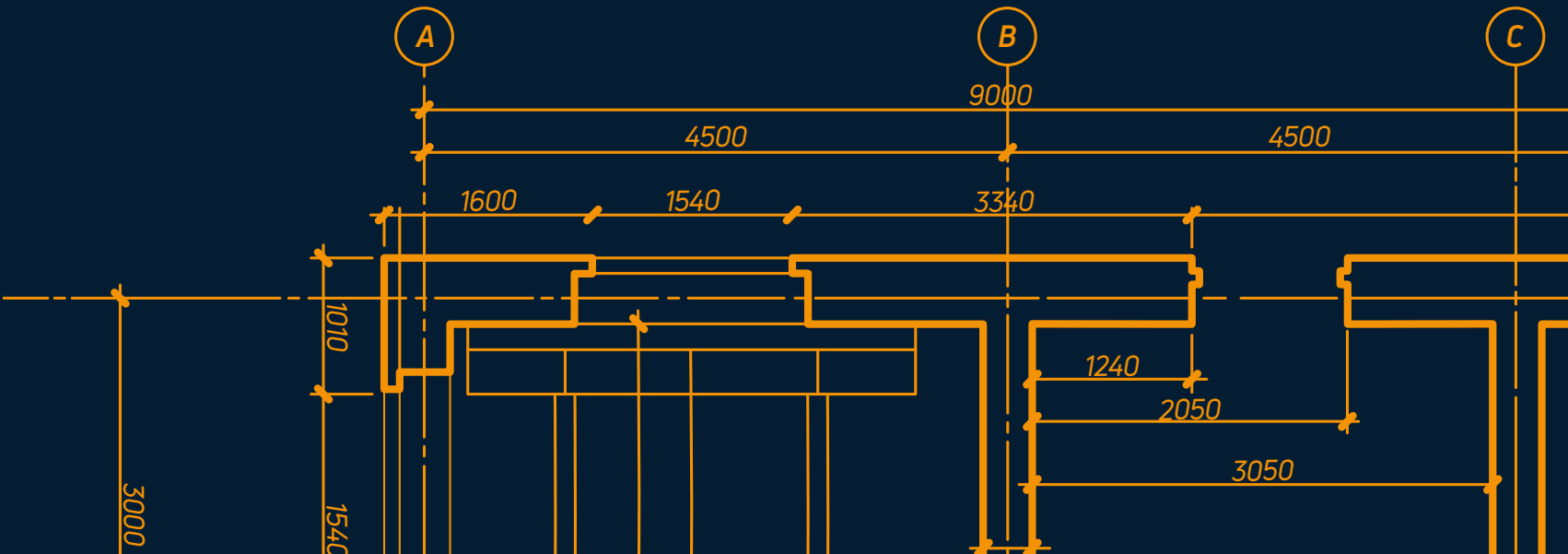
On-boarding a scheme

On-boarding has become second nature to us. We've perfected a six step journey that makes schemes transfer refreshingly straightforward. By asking the right questions upfront and overcoming barriers, we can make the switch as seamless as possible.

1. An initial discussion helps to evaluate if a scheme is a good fit for everyone – we'll look to get data on the scheme's performance and understand your plans for it at this stage
2. We'll assess the scheme and get back to you as soon as we can, depending on the complexity and the data provided
3. If it's good to go, we'll introduce you to your project team and get started. Together we'll look at timeframes, marketing, compliance, underwriting and pricing
4. With close collaboration and regular contact throughout, we can often project manage to market in as little as eight weeks
5. Within the first six months of the scheme going live, we'll review to make sure that everything is as it should be and identify any issues that may need addressing
6. You'll be assigned a point of contact for day-to-day management, the scheduling of your annual scheme health check and any other support you may require.

"We wanted to work with a partner that would actively support us during the transfer process and in growing our nursery scheme. Ecclesiastical was the clear choice for the quality of their support and their willingness to work with us to achieve our growth objectives."

Poundgates, A partner since 2017





A blueprint is nothing without skilled people. Our specialist team is dedicated to schemes. 100% of our focus is in delivering ongoing success to our brokers. With our expertise and commitment, we believe your scheme couldn't be in better hands.

"We have worked with Ecclesiastical for several years including the recent transfer of a specialist personal lines scheme. The quality of service and day to day support we receive is exemplary, driven by Ecclesiastical's desire to support our growth ambitions, without compromising profitability. On-boarding was seamless, with the team always willing to host or attend meetings when necessary, as well as being at the end of the phone whenever needed. Ecclesiastical are as passionate as we are to grow and develop our business."

Towergate Military

This is a partnership, so relationships matter. Our close-knit team get to know you and your scheme, so you'll always have a regular and engaged point of contact. Once you've joined us, you'll be in the care of the Existing Schemes Team who make up over 80% of our whole team. They'll truly partner with you to nurture and grow your scheme.

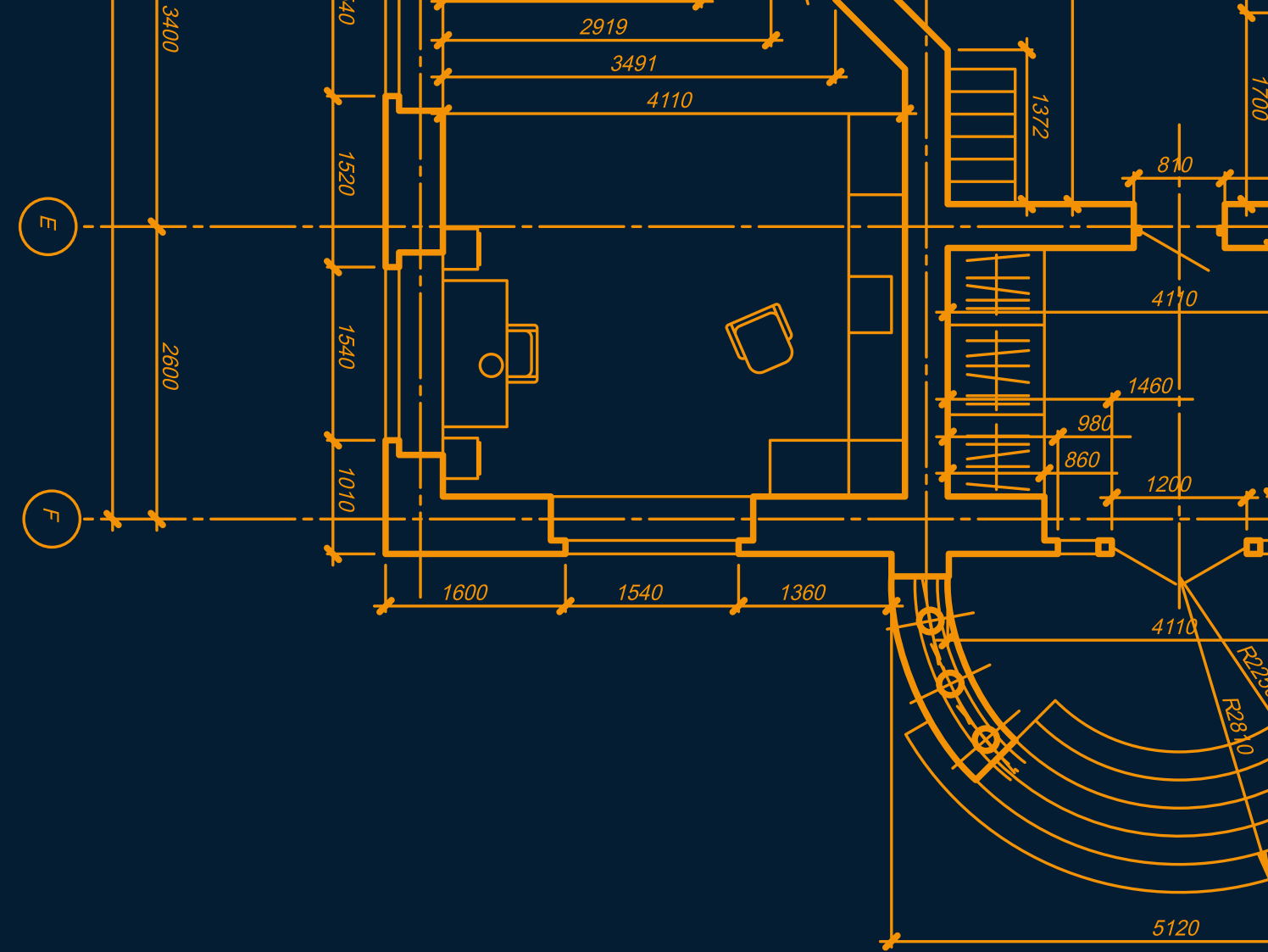
- ◆ They proactively look for ways to help and conduct regular analysis on the performance of your scheme – bringing to life our commitment to actively manage every scheme
- ◆ Our marketing support taps into the considerable expertise of the wider Ecclesiastical business
- ◆ Annual scheme health checks and our active management look at development opportunities to keep the scheme relevant to your customers
- ◆ We provide access to compliance and risk management support
- ◆ We help you access wider distribution opportunities through our online Schemes Marketplace.

Experts in managing risks in our specialist markets

Our in-house team of qualified risk specialists are here to provide support. With our in-depth knowledge and experience within our specialist markets, means we can help your clients manage their risks.

Our range of risk management services include:

- ◆ Our free [Risk Advice Line](#)¹ provides access to our in-house team of risk experts who are on-hand to answer any risk related queries.
- ◆ Access to a wide range of digital risk guides and checklists, all available on our [Risk Management hub](#)
- ◆ We run technical webinars and seminars on a range of risk topics to help customers manage their risks. Discuss the options available with your Account Manager
- ◆ Want to build your risk knowledge? We've a range of E-learning tools available on key risk management topics
- ◆ We provide Enterprise Risk Management support ranging from practical tools, templates and checklists, webinars and training sessions through to bespoke consultancy.



Award winning claims

If you need claims handling support, our dedicated team is ready to support 24 hours a day, 7 days a week, however big or small the issue. We'll work swiftly and always deal with a claim fairly. If we can resolve the claim after first contact – we will.

97% claims satisfaction¹, so if the worst should ever happen, your clients can be assured they are in safe hands.

- ◆ Our UK based expert claims team responds quickly, clearly and with empathy, offering advice and guidance throughout the life of a claim
- ◆ A dedicated claims handler will take ownership, provide regular updates and help keep things as simple and stress-free as possible.

1. Ecclesiastical claims satisfaction survey 2021 - 210 intermediated clients who have had their claims settled.



- ◆ Our funds are responsibly and ethically invested via Eden Tree, the UK's leading ethical investment management company, and part of Benefact Group
- ◆ First insurer to commit to the HSE's strategy 'Helping Great Britain Work Well' improving working practices for all
- ◆ Our Movement for Good initiative is just one of the ways that we give back to society. Since 2019 we've donated over £3million to good causes and charities through grants ranging from £1,000 to £50,000.

Changing Lives

Established over 135 years ago to contribute to the greater good of society, today this vision remains unchanged, with our sole purpose to give back to the communities in which we do business.

Ecclesiastical is proud to be part of the Benefact Group – an international family of specialist financial services companies, built on the idea that better business, can better lives.

The Benefact Group is owned by a charity – the Benefact Trust. This allows us to give in two main ways – directly from the Group and its family of companies including Ecclesiastical Insurance and through granting a significant proportion of our profits to the Benefact Trust for distribution to good causes.

"We have 320 children at the school, all of whom have learning difficulties and many also have profound and multiple physical and medical disabilities. There is ongoing work to improve the outdoor play and learning areas to ensure children with physical disabilities can access stimulating and fun activities. We put this donation towards a wheelchair accessible roundabout for the playground. Many children benefit from this and they love it. We would like to thank everyone who voted for us and Ecclesiastical for their wonderful campaign."

Lyn Dance, CEO Sand Academies Trust. Recipient of a £1,000 Movement for Good Awards grant

Why choose Ecclesiastical?

Providing specialist insurance to customers for over

135 years



Financially secure

We have A2 Moody's' and A rating AM Best



Voted best

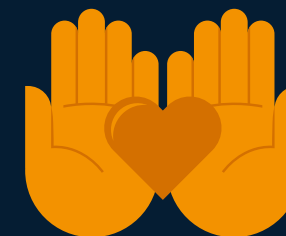
Voted best charity, heritage and education insurer for 15 years by a panel of brokers¹



Award winning claims team² with

97%

satisfaction³ from intermediated clients who have had their claim settled



Owned by a charity

We're a commercial business with a charitable purpose. We give a significant proportion of our profits to our charitable owner Benefact Trust for distribution to good causes

1. 2008 to 2022 Broker Research by FWD - panel of independent brokers (sample sizes range from 100 - 250 over the last 15 years).

2. Winner of the Personal Lines Claims Team of the Year award and Customer Care Individual award Insurance Post Claims and Fraud Awards 2020.

3. Ecclesiastical claims satisfaction survey 2021 - 210 intermediated clients who have had their claims settled.

We're ready to help you realise
your scheme's full potential.

Discover more about what makes us
a different kind of insurer

Email: schemes@ecclesiastical.com

Visit our website: ecclesiastical.com/schemes



Proudly part of the Benefact
Group – specialist financial
services companies built to
make a difference.