

CAMPBELL IRVINE

DIRECT TRAVEL INSURANCE

INTRODUCER APPOINTED REPRESENTATIVE SUMMARY

Please find below a summary of how to become an Introducer Appointed Representative (IAR) of Campbell Irvine Ltd, in relation to the sale of Campbell Irvine Direct retail travel insurance. Please note there are no fees or costs associated with becoming an IAR of Campbell Irvine.

The referral process could include a combination of any of the following:

- 1) A unique and branded URL to our website. <http://www.campbellirvinedirect.com>
- 2) Email enquiries to a helpline address at Campbell Irvine info@campbellirvine.com
- 3) Telephone helpline where your client's can obtain a quotation and purchase travel insurance directly from Campbell Irvine. 020 7938 1734.
- 4) Branded travel insurance applications forms (available upon request) with Campbell Irvine's contact details to be sent by you to your clients.

Whilst as a company you would not be allowed to transact any form of travel insurance policy sales or collect any insurance premiums, as an IAR you would be entitled to receive a commission for referring your clients to Campbell Irvine who are fully authorised and regulated by the Financial Conduct Authority (FCA). All commissions collected by Campbell Irvine will be rebated to you on a monthly basis together with a summary breakdown of the corresponding policies which have been issued to your clients. You will be able to advertise Campbell Irvine as your preferred travel insurance providers on your website and marketing literature. Please note you would need to incorporate additional regulatory text when displaying information about travel insurance to your clients. "*Name of your company* is an Introducer Appointed Representative of Campbell Irvine Ltd who are Authorised and Regulated by the Financial Conduct Authority."

As an IAR, you will not be able to give 'advice' relating to the potential suitability of your preferred travel insurance policy based on each client's travel insurance requirements.

You will however be entitled to direct your client's to Campbell Irvine's team of Travel Insurance consultants. You will also be able to provide your client's with information about the travel insurance you offer.

When you arrange a booking for a client who enquires about travel insurance, you will be able to provide the client with Campbell Irvine's contact details (email or telephone) or forward details of the travel insurance to your clients by post or



email or online via a unique URL on your website. We can also arrange to forward a suggested simple text to incorporate into your website to give

you an idea of what travel insurance content you would need to add.

All quoted premiums include a set commission of up to 15% for single trip and 10% on annual multi trip policies after tax.

If you would like to proceed in becoming an IAR and refer your clients to Campbell Irvine, we will need to arrange to register your company with the FCA. Your clients will then be able to obtain confirmation that you are an IAR of Campbell Irvine by checking on the FCA's Register at www.fca.org.uk In addition to sending you written confirmation of your IAR status, we will also require you to sign a copy of our standard IAR Terms of Business form (copy available upon request), which is a simple document confirming our working relationship, confirming your company will be entitled to a commission for referring your clients requiring travel insurance directly to Campbell Irvine as an IAR.

Once we have completed the application process we can arrange to your new branded link for you to add to your website and emails to send to your clients, together with a word document with some suggested text explaining how your clients may arrange travel insurance through Campbell Irvine Direct which you can incorporate into your website and documentation.

Contact: info@campbellirvine.com Tel: 020 7368 1154

Registered Office: 52 Earls Court Road, Kensington W8 6EJ. Registration no. 1117838