



CLIENT DIGITAL JOURNEY FOR BROKERS

Positioning AIA Financial Wellbeing in your client communications

Formal Approval – To include light touch introduction of AIA offerings

The following wording is approved by AIA to be included in emails to clients at Formal Approval stage, to introduce the AIA Financial Wellbeing offering. You may like to attach a copy of (or link to) the [AIA Client Flyer](#).

With settlement coming up, it's worth checking whether you have sufficient life insurance to protect your most important investment – you and your loved ones. Ensuring you have the cover you need in case the unexpected happens can bring enormous peace of mind.

We partner with AIA Financial Wellbeing who can provide advice - free of charge – on AIA life insurance and income protection. They can explain the options, provide a quote and help you apply. If you want to get the ball rolling now, [register your contact details](#) and AIA will be in touch.

Settlement Completed – This is the best opportunity to reinforce the importance of protection for your clients

The following wording is approved by AIA to be included in emails to clients at Settlement Completed stage, to introduce or remind your client about the AIA Financial Wellbeing offering. You may like to attach a copy of (or link to) the [AIA Client Flyer](#).

If not already done so you should consider looking at your life insurance and income protection requirements. We partner with AIA Financial Wellbeing who can explain the options, and help you get a quote and apply – all in one phone call. They can also help you review your health insurance.

If you're interested in having a chat with AIA, simply [register your contact details](#) and they'll be in touch.

Re-Pricing – Your next best (and maybe final) opportunity to drive home the importance of having the right insurance protection in place, and how AIA can help.

The following wording is approved by AIA to be included in emails to clients at Re-Pricing stage, to introduce or remind your client about the AIA Financial Wellbeing offering. You may like to attach a copy of (or link to) the [AIA Client Flyer](#).

If not already done so, now is the time to look at your life insurance and income protection requirements. You've probably insured your house and contents in case of damage or burglary, but have you got the right cover in case you got seriously ill or injured and couldn't work for an extended period? Without an income, how would you keep up your mortgage repayments and other bills?

Don't risk it. Having the right protection in place has never been more important.

We partner with AIA Financial Wellbeing who can explain the options, and help you get a quote and apply – all in one phone call. They can also help you review your health insurance.

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