



McDonald Everest
Insurance Brokers Limited

CLIENT CARE STANDARDS

Enhancing Clients' Insurance Experience

Our Promise

Our promise to our clients is that we will always put them first, always aim at doing the right thing for them, and being there when they need us.

In achieving this, we will always align our activities with the Code of Professional Conduct relative to our industry, especially in maintaining ethical behavior and excellent Client Care Standards. Our Client Service Standards below describe how we will achieve this.

STANDARD 1: Treat Clients Fairly

- Starting with listening, we will always communicate openly and transparently.
- We will respond quickly to any request or enquiry.
- We will aim at achieving the best solution available to our clients.

STANDARD 2: Act with Integrity

- We promise we will act with integrity in all our activities, and in the best interests of our clients by providing honest advice and using products that are secure. We will maintain positive relationships with other industry participants that are aligned with our clients' interests.

STANDARD 3: Give Advice that is Suitable

- We promise that we will always provide clarity about the products we provide and our reasons for recommending them, by using our significant resources and experience.

STANDARD 4: Ensure that our client understands the Financial Advice that we provide.

- Our clients can fully expect to understand our advice, by way of us giving accurate information, with doors left open for follow-up, enquiries and clarification

STANDARD 5: Protect Client Information

- We promise that we will protect and ensure privacy for any client information, by secure physical and electronic storage.
- Our clients can fully expect that we will treat any personal information as confidential.
- We will comply with the requirements of The Privacy Act.

STANDARD 6: Have General Competence, Knowledge, and Skill

- Our clients can expect that our staff are appropriately trained and qualified to give advice by achieving the prescribed Level 5 qualification.

STANDARD 7: Have Particular Competence, Knowledge, and Skill for Product Advice

- Our clients can expect that we have appropriate knowledge of the products we sell, by regular upskill and keeping up to date with industry information.

STANDARD 8: Keep Competence, Knowledge, and Skill Up to Date

- Our promise to our clients is that we will keep our industry knowledge up to date by staying current with industry news, products and studies.
- We will have a plan in place to maintain competence to provide proper advice.