



insurance brokers
claims management

Authorised Representative Benefits Package

Are you highly motivated?

Do you want to run your own business?

Do you want training and support when you need it?

SRG Group is one of Australia's leading corporate and small business insurance broking firms, with origins dating back to 1978. As one of our Authorised Representatives, you'll have the opportunity to set up and run your own business while enjoying all the benefits that come with being part of an established national company.



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building on our strengths

SRG Group is a proactive business builder. We are progressive and innovative and will work with you to help you become successful.

We have embraced the Authorised Representative business model because it allows entrepreneurs to explore their own business desires and achieve their goals without the barriers of excessive establishment and compliance costs.

product support

With our backing, you will have access to superior product wordings, higher commissions and negotiating influence with Insurers through the Austbrokers and AIM's network.

Client risks can be complex, diversified and may require bespoke design and placement expertise. Our Authorised Representatives have access to product technical support they need to manage their diverse client risks and compete successfully against corporate firms on an equal footing.

group purchasing benefits

As equity partners of AUB Group Limited and members of A & I Members Services (AIMS) our Principal Partners can take advantage of a wide range of group purchasing benefits such as :

- Travel
- Accomodation
- Telecommunications and internet
- Motor vehicles
- IT Hardware and software



claims management

Your clients will benefit from a best practice claims service. We are not a post office box service for claims; we offer dedicated claims management service with specialised technicians to ensure your clients receive the best claims service available. After all, it is how well claims are managed that ultimately determines how your client feels about your service.

You can get on with your business knowing that our claims team are keeping you and your clients informed along the way and ensuring all claims are dealt with fairly and expediently.

administration & IT support

Our modern offices and state of the art IT systems will help you to run a very professional, well organised business your clients will feel proud of. You will have access to:

- Full Reception support (Client meet and greet)
- Remote IT access to broking systems and desktop software
- Advanced back up solutions for best practice business continuity capabilities

- Mail and banking
- Fully serviced work station
- Stationery

relief support (absent from the business)

You work hard and even though you own your own business that doesn't mean you don't deserve to take some time out of the business to relax and recharge the batteries. We can provide relief services while you are away on leave.

training support

We believe knowledge is power, and as such we take compliance with the Corporations Act 2001 seriously. We believe our people are our biggest asset, that's why we want to ensure we provide the framework of continuous development of knowledge and skills.

Personal Development is managed for you, we will monitor your training hours and assist with training needs you have.

We will facilitate relevant training programs during the year, to suit your needs.

incentives

Our primary goal is to help you achieve your goals, that is what a synergised partnership means.

We have introduced growth incentives and other benefits to support your business goals and reward you for the hard work you put into developing your business.

bespoke licensee fee models

You can design a business support model that best suits your needs. We will help you assess the benefits of utilising our fully serviced model or any modified versions if preferred. You only pay for the services you need.

succession

You own your business and can dispose of it at your discretion at anytime. The possibility of resolving a succession plan for your business if you suffer from an illness or an accident can leave your business exposed. We will provide at your discretion a safety net provision in the unfortunate event of death or total and permanent disability to give you peace of mind your business asset value is protected.

premium funding

Our Authorised Representatives receive all upfront commissions from Premium Funding arrangements pertaining to their own clients

annual conference

Our annual Authorised Representative conference is held at an offsite location conducive to taking time out of the day to day in an environment that will stimulate both learning and social participation.

We have incentives for Authorised Representatives to travel and attend conferences at no cost.





client service team

Many of our Authorised Representatives have clients that over time do not require the hands on Account Management services they provide but still require a central contact point.

You can take advantage of our Client Service Team with qualified Internal Brokers servicing your clients. These services include:

- Micro Client servicing to free you up to grow your business
- Policy Processing Centre
- Inbound Client call support

insurance protection

As part of the AUB Group we participate in industry leading Professional Indemnity, Management Liability, Cyber Liability and Corporate Travel insurance cover. Our Authorised Representatives are protected by our comprehensive insurance arrangements.

compliance support

We manage your ASIC and Legal obligations to ensure you do not have to worry about this side of the business. Compliance can be a confusing and complex environment, we have internal compliance personnel and access AUB's compliance team for additional expertise.

marketing support

Marketing your business requires expertise and resources to effectively execute your marketing plan.

We have internal and external expertise that can assist you in delivering marketing strategies in the following areas;

- Digital Marketing
- Lead Generation
- CRM
- Client Events
- Graphic Design
- Schemes
- Print and electronic promotional material



strategic partners

Our Authorised Representatives have the added advantage of accessing the specialist services of our Strategic Partners such as:

- product development
- legal advice (contractual indemnities)
- claims advocacy

AUB Group Limited is an ASX200 listed group comprising insurance brokers and underwriting agencies operating in >500 locations across Australia and New Zealand. We work with ~850,000 clients to place more than \$4.0bn + GWP in insurance premiums with local and foreign insurers.

Since our inception in 1985, we committed ourselves to safeguard a stronger future for clients, partners, employees and shareholders – and we stand by that commitment today. Whether we are providing products, services and solutions that help protect them from harm, damage and financial burden, our partners and advisors provide trusted support and guidance to

clients on the optimal combination of physical, people and financial risk solutions.

The driving philosophy behind our success is an equity based business model where the owners remain directly responsible for the day to day operations. At the same time, each business actively leverages the advantages of our scale, infrastructure, and operational know how. Together, we are actively building extraordinary businesses.



marketing resources

In-house marketing collateral

Your Name
Principal Broker

p. 1300 551 969
d. +61 8 9442 1100
m. +61 400 000 000
e. name@srggroup.com.au
w. srggroup.com.au



insurance brokers
claims management

equity partners of  austbrokers

Alluvion
Level 16,
58 Mounts Bay Road
Perth WA 6000
PO Box 7377
Cloisters Square PO
Perth WA 6850

Insurance & Risk Solutions

- Corporate Insurance Programs
- Workers' Compensation
- Business Insurance Packages
- Professional and Financial Risks
- Claims Management Services

Our Brands



SRG Group
stationery



insurance brokers
claims management


Alluvion Building
Level 16,
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SRG Group Pty Ltd
ABN 52 113 251 100
AFS Licence 280205



insurance brokers
claims management

equity partners of  austbrokers

Mr T Test
TEST CLIENT
PO Box 2115
CHURCHLANDS WA 6018

TAX INVOICE I1083419

Invoice Date : 09.12.2015
Policy Class : ZZ - TEST HH
Policy No : TESTING
Period : 09.12.2015 to 09.12.2016

Our Ref : SRG PER T7044 0219706/001
Insurer : Allianz Australia limited
GPO Box K772
PERTH WA 6842

TOTAL PAYABLE \$.01
Includes GST \$

TRANSACTION DESCRIPTION
** NEW POLICY **


INSURED
TEST CLIENT

BRIEF DESCRIPTION

Contact Details: Joe Bloggs
joeb@thesrggroup.com.au 08 9442 1111

IMPORTANT NOTICES
1. Our payment terms are 7 days or the due date of the policy whichever is the later.
2. Please carefully read your DUTY OF DISCLOSURE and important notices overleaf.


METHODS OF PAYMENT: Total Due \$.01

 Biller Code : 667286
Reference : I10834199

Telephone & Internet Banking - BPAY[®]
Contact your bank or financial institution to make this payment from your cheque, credit card, savings, debit or transaction account.
More info: www.bpay.com.au

 Visit our website to pay using your Visa, Mastercard or Amex
www.srggroup.com.au
Client Ref: SRG PER T7044 Reference: I1083419
Client Name: TEST CLIENT

Please note: An Administration Fee inclusive of GST will be charged at 1.5% for Mastercard & Visa, & 3.5% for Amex.

 We can assist with your premiums.
Should you wish to obtain a Funding Quote for this service, please contact us on 1300 551 969 & ask for Billanate Service Team.

Premium:
.01



SRG Group
corporate brochure



SRG Group
insurance &
risk profile report

EDM examples



Campaigns

Recent

Ongoing

Draft

Completed

Create Folder

New Folder

Find a campaign by name, type, or list

March, 2018 (1)

CrossFit Insurance Packages Sent 59.0% 5.1%
Regular - Sport & Leisure List (segment)
Sent Thu, March 15th 10:00 AM to 52 recipients
Opens Clicks

February, 2018 (1)

cancellation Sent 45.2% 0.5%
Regular - Sport & Leisure List
Sent Tue, February 13th 3:09 PM to 641 recipients
Opens Clicks

December, 2017 (1)

Xmas EDM 2017 Sent 39.3% 0.8%
Regular - SRG CORP Active Clients List including ARS
Sent Fri, December 22nd, 2017 11:07 AM to 1K recipients
Opens Clicks

November, 2017 (1)

corporate travel Sent 36.9% 1.3%
Regular - SRG CORP Active Clients List including ARS
Sent Tue, November 28th, 2017 8:00 AM to 2K recipients
Opens Clicks

July, 2017 (2)

Bikesure Kit Giveaway Week 2 Sent 35.2% 2.6%
Regular - Bikesure Client and Prospect List
Sent Fri, July 14th, 2017 7:35 AM to 7K recipients
Opens Clicks

Bikesure Kit Giveaway Sent 41.1% 5.1%
Regular - Bikesure Client and Prospect List
Sent Mon, July 3rd, 2017 9:31 AM to 8K recipients
Opens Clicks

June, 2017 (1)

builders warranty increase (copy 01) Sent 29.7% 0.0%
Regular - SRG Master Leads & Prospects List (segment)
Opens Clicks





Your Brand
Corporate brochure



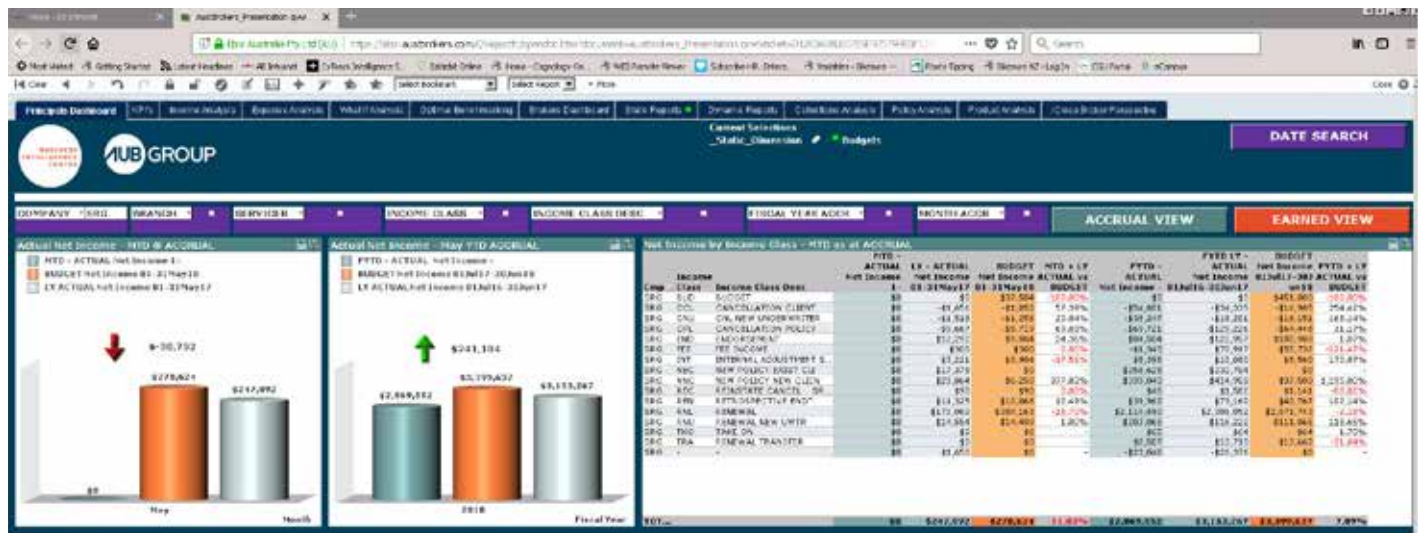
Your Brand
Insurance &
Risk Profile Report

SRG technology solutions

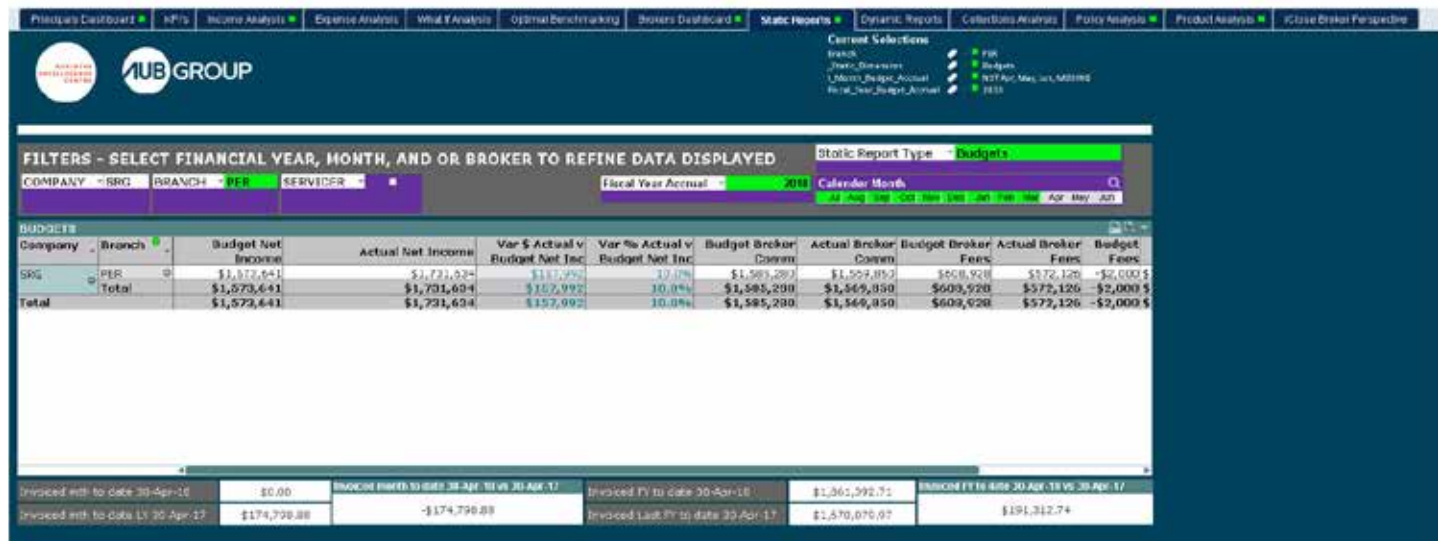


AUB business intelligence reporting system

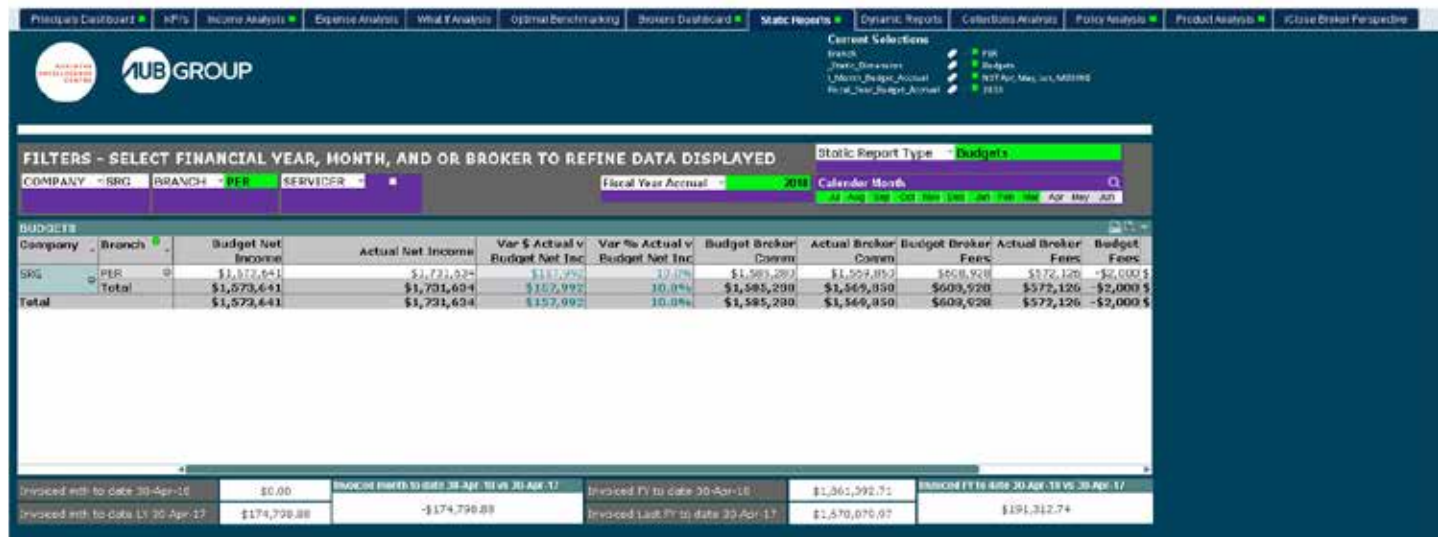
Dashboard Reporting



Budget Reporting (Portfolio Level)

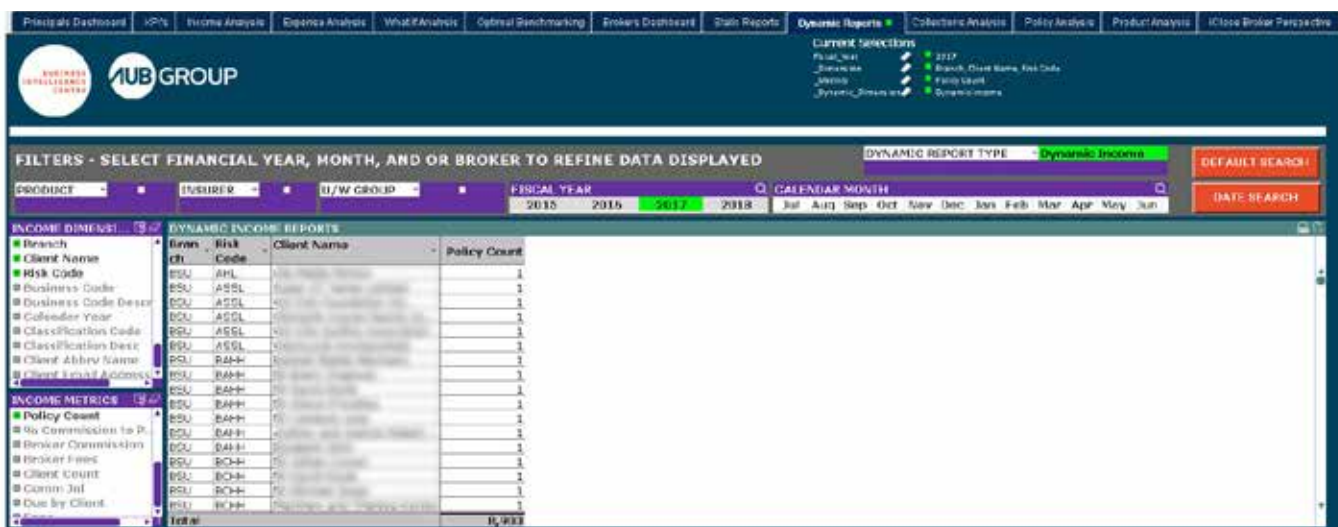


Budget Reporting (Client Level)

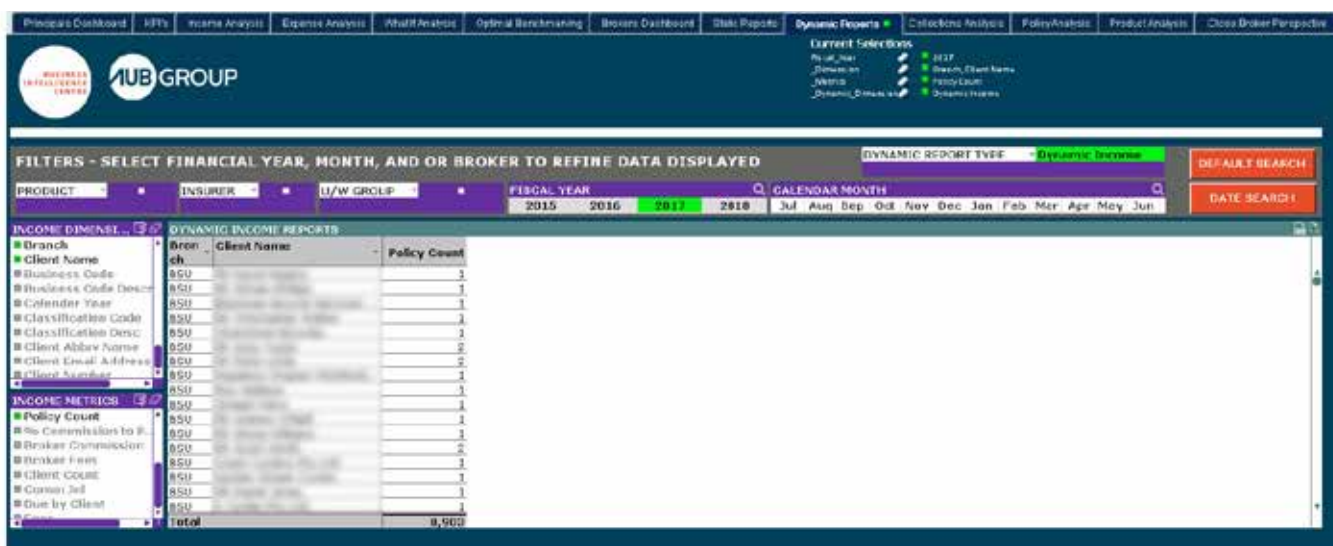


AUB business intelligence reporting system

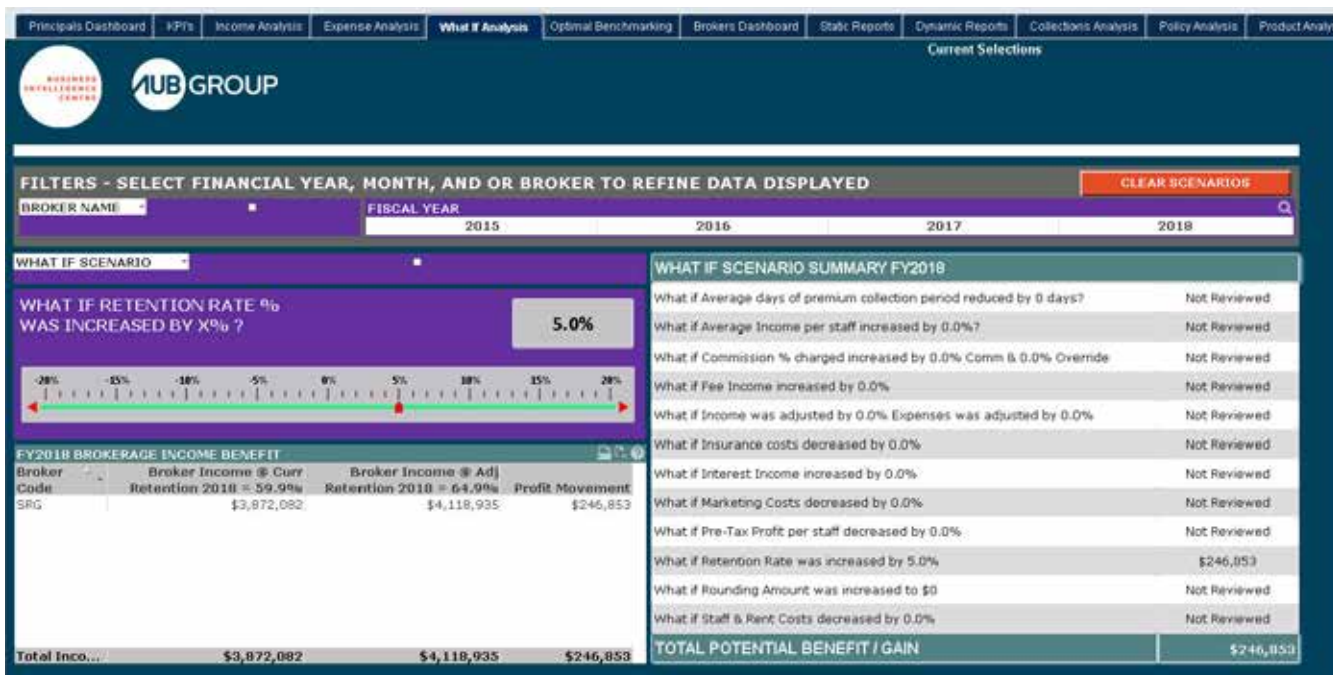
Client Reports (Risk Type)



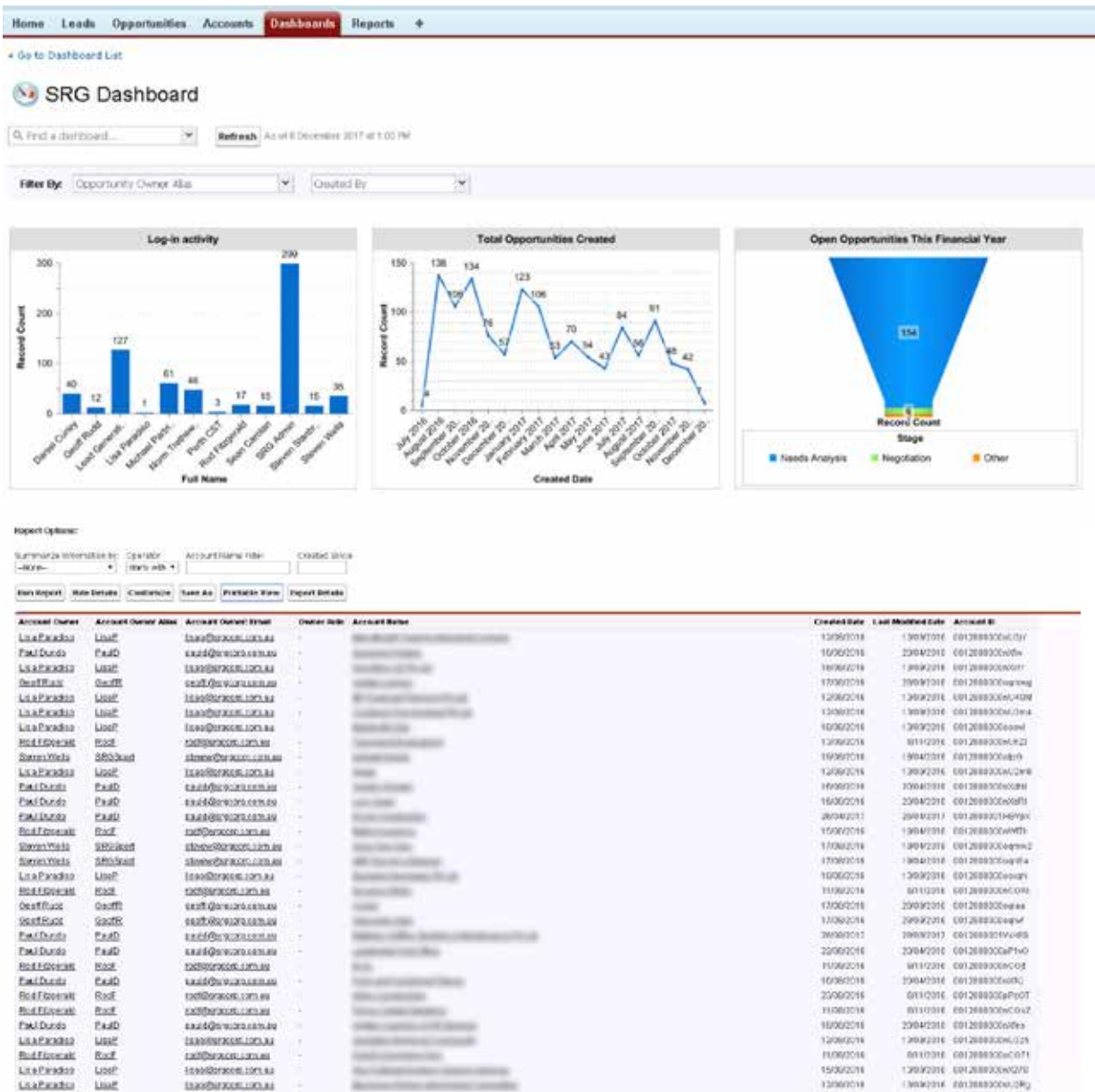
Client Reports (Policy Count)



What if Analysis



Fortix CRM system



The screenshot shows the 'New Lead' form in the Salesforce CRM. The form is divided into two main sections: 'Lead Information' and 'Optional'. The 'Lead Information' section contains the following fields:

- Salutation: A dropdown menu with 'Mr.' selected.
- First Name: A text input field.
- Last Name: A text input field.
- Company: A text input field.
- Phone: A text input field.
- Email: A text input field.
- Website: A text input field.
- Lead Source: A dropdown menu with 'Referral' selected.
- Lead Status: A dropdown menu with 'New' selected.

The 'Optional' section contains a checkbox labeled 'Assigning a flow assignment rule'. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

contact us

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e. info@srggroup.com.au
w. srggroup.com.au

The Austbrokers Network,
over 100 Offices Nationally

SRG Group Pty Ltd
ABN 52 113 333 109 | AFSL 288320



Insurance & Risk Solutions
Corporate Insurance Programs
Workers' Compensation
Business Insurance Packages
Professional and Financial Risks
Claims Management Services

prosport **bikesure**
cover