

The natural choice  
for friendly, expert  
advice on insurance,  
risk management  
and financial services



# Welcome

As an insurance and financial planning group with more than 40 years' experience, our longevity and reputation are the result of doing things a little differently – of going the extra mile for you, for our people and for our communities.

Alongside insurance and financial advice, we provide a distinct range of additional services, so you can get everything you need in one place.

This brochure will guide you through how we work and introduce the people committed to providing expert advice, presenting our ever-evolving range of products and services along the way.



## Chairman's message

When we started the business more than 40 years ago, we had one core focus: to provide personal, straightforward advice to all our clients.

We must have done something right, because word got around and the business has grown ever since.

And although more than four decades have passed, nothing has changed; I expect every member of the team to treat our clients in the same way we always have – by providing expert, friendly advice every time.

I hope you find this brochure useful, but I would very much encourage you to talk to us – for as long as you like, about whatever you like.

**Alan Boswell,**  
Executive Chairman

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## About us

We are the people our clients turn to for support and guidance at every milestone

With eight offices and more than 420 members of staff, we're ideally placed to ensure you and your business receive expert advice whenever you need it.

As well as arranging both personal and commercial insurance, we have an ever-evolving portfolio of added-value services, including underwriting, claims handling, risk management, specialist equipment inspection and health and safety consultation.

Our financial planning teams can also provide ongoing advice and support on a range of employee benefits for businesses – while our personal finance experts can give guidance on your savings and investments, protection or retirement plans.

Whether you use our services in isolation or as part of a package, you are guaranteed to receive the same high standards, every time.



## Our people

Our reputation and status as one of the UK's largest independent insurance brokers and financial planning groups is maintained by our people.

From our graduates and apprentices to our directors and specialists, we ensure that we attract and retain the best and brightest talent.

We look after our people by providing a friendly, professional environment in which they feel valued and supported. We encourage them to train, develop and grow with us. We do this so they can put their expertise, experience and enthusiasm into looking after you.

## Our values

- **Pride:** We are passionate in what we do and are proud of our reputation.
- **Integrity and honesty:** We respect and trust all, act responsibly and behave ethically, with professional integrity.
- **Our service:** We make an effort to understand our customers, enabling us to add value and provide a superior service.
- **Working together:** We are working together towards a common goal and take ownership and accountability for the role we fulfil.
- **Achieving results:** We aim for success in everything we do.
- **Creativity:** We continually work towards improving and developing what we do to optimise growth and build on our successes.



## Business insurance services

We take an intelligent, consultative approach to you and your assets. We don't just match you to the closest product and price; we tailor solutions that fit your unique requirements.

We are renowned for our attention to detail and our positive, longstanding relationships with insurers, which help us create quicker, more efficient processes for you.

Our aim is to provide you both the convenience and reassurance that comes from having a comprehensive team handling all aspects of your insurance needs. That's why we made the decision to bring crucial skills in-house – from claims handling to health and safety consultation and equipment inspection.

Providing you with superior insurance services is at the heart of what we do. That was our aim when the firm was established more than 40 years ago and is reflected in the credentials, accreditations and awards we hold today.

The breadth of our expertise is demonstrated by our people, who will support you with friendly, specialist advice whenever you need it. Our nationwide reputation, client testimonials and recommendations are further evidence of the high level of service you can expect from us.



We don't just match you to the closest product and price; we tailor solutions that fit your requirements.

### Our commercial insurance specialisms include:

- Agriculture
- Property
- Construction
- Renewable energy
- Leisure & Hospitality
- Professional risks
- Care & Medical
- Credit
- Science & Technology
- Cyber

// We have such a good relationship with Alan Boswell Group. I'll quite happily ring them up for a chat or I know I can always arrange a face-to-face meeting. //

Jonathon Simpkins,  
Bluespace





“ We take pride in getting to know our clients – from their sites and their equipment to their customers – so we can deliver a truly bespoke service. ”

Simon Wyeld,  
Lead Engineer



## Risk management

Our risk management services will not only help you to better understand the risks you face, but in many cases, how to manage and mitigate them too. We want you to benefit from our experience and reduce the risks you face.

We can provide health & safety services including consultation and engineering inspections from our dedicated surveyors. Our aim is to ensure your business remains compliant with current legislation at all times and benefits from ongoing advice and reassurance.

Like all of our support services, risk management can be provided in a standalone capacity or as part of a package. So whether you simply need annual equipment inspections, or require a full risk assessment and management programme, we will be happy to work with you.

We are also registered as an IOSH and NEBOSH approved trainer and a ROSPA approved E-learning provider.

Whether you're looking to upskill a number of key personnel to help with your H&S obligations or train your entire employee base on the fundamentals of health and safety, Alan Boswell Risk Management can help with your training needs.

Our courses are run by one of our skilled Risk Managers and we offer a range of off-the-shelf and bespoke options to provide you with the most suitable solution for your requirements.

We provide support and advice in the following areas:

- Risk assessments
- Business continuity planning and support
- Engineering inspections
- Health and safety compliance auditing
- Fire safety management



// The team at ABG is working with us in a “trusted adviser” role, which has given us confidence in the protection and service, as well as peace of mind to focus on the day-to-day. //

Richard Hindson,  
East Anglian Air Ambulance



## Additional services

### Claims

Our dedicated claims team will manage your insurance claim and support you through the process. You'll work with one claims manager, so will have a personal point of contact helping you throughout what can be a stressful time.

Our claims managers have previous experience of working with major insurers, giving them valuable insight into the claims process, allowing them to bring your case to the best possible conclusion.

Some of the ways you will benefit from this service include:

- Early intervention when losses occur
- Access to your own expert claims handler
- Site visits

If you need to make a claim you can call us and we'll help you every step of the way.

### Underwriting

We have always taken an individual approach to our clients because we know one size rarely fits all.

Our in-house underwriting team takes this tailored attention to detail even further. They use their expertise to create unique policies with bespoke covers that benefit our clients – so you get exactly the right insurance for your needs.

**Our underwriting service allows us to devise, design and price products tailored to protect you.**





## Private clients

Our industry awards and accreditations tell everyone what sort of organisation we are, but it is the individual care our clients receive that tells them what sort of people we are.

Many of our corporate clients become private clients and vice-versa. We think this says a lot about the level of trust that our expert advisers earn.

We can arrange all types of personal insurance for you, from car and landlord insurance, to specialist cover for high-value homes and boats.

In fact, we know that off-the-shelf products are often unsuitable, so we provide a personal service and tailored solutions. We can arrange independent valuations and ensure that valuable items, including antiques and fine art, are fully covered.

But it's not just about insurance for your possessions. We can review your health, life and private medical cover to ensure that you and your loved ones have access to the best treatments if the worst happens.

Whatever your requirements, you'll have access to a dedicated contact who can provide ongoing insurance advice and support whenever you need it.

As a reflection of this, we have been presented with a Platinum-Trusted Service Award by independent review site Feefo, having consistently achieved outstanding customer service scores.

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It's great working with Mark. I enjoy the personal service and being able to pick up the phone and speak to him. He now insures the house, the cars and even the business, as well as most of my family's insurance. //

EXCEPTIONAL



4.8 OUT OF 5

feefo

Priscilla Bradley-Watson,  
Private Client





## Financial planning

Giving you the reassurance of working with friendly experts whose clear, intelligent advice puts you in control of your future.

Financial planning is a fast-moving sector that often seems daunting and unpredictable. Having access to independent financial advice will help you gain clarity and achieve your goals.

For more than three decades, our team of expert consultants have combined their experience with their understanding of our clients' situations to provide straightforward, jargon-free recommendations.

We can provide guidance on a diverse array of topics, including investments, savings, pensions, life insurance, private medical insurance, income protection, long-term care and critical illness cover.

We also take pride in the fact that our fees and processes are completely transparent, so there are no surprises along the way.

// We take the time to build strong relationships with clients. They trust and respect what we do. //

Sally Key,  
Director - Financial Services

**SIFA**  
PROFESSIONAL

We can provide advice on a range of subjects, including:

- Savings & investments
- Pensions & retirement planning
- Tax-efficient investments
- Life insurance
- Private medical insurance
- Critical illness cover





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With so many options available, employee benefits can seem complicated. We can help you make the right choice for your team. //

Alex Mhandu,  
Head of Healthcare

# Employee benefits

From auto-enrolment pensions to group private medical insurance, we ensure that you find the right solution to motivate your workforce.

Employee benefits are an excellent and cost-effective way to attract, retain, motivate and reward your workforce.

Our dedicated employee benefits team provides ongoing support to a range of businesses, from start-ups and small companies, to expanding organisations and multinational corporations.

Whether you need to decipher the vast number of pension options on offer, or are considering taking out group private medical insurance, we can help you create innovative packages tailored to your employees' needs.

We provide tailored, innovative packages for companies:

- Workplace pensions
- Death in service schemes
- Group income protection
- Group medical insurance
- Key person cover
- Group critical illness
- Shareholder/partnership protection
- Relevant life insurance
- Health cash plans





## Our community

Norfolk's  
Cancer Charity  
Since 1980

BIG

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It's great to work for a company that takes an active role in the community. There's always something to get involved with. //

Kathryn Jervis,  
Broking Analyst

Our generous employees have raised thousands of pounds for charities across the UK, through all sorts of fundraising initiatives from head-shaving and biking-riding to cake-baking and Christmas jumper days.

2019 saw the launch of the Alan Boswell Group Charitable Trust, an independent Trust with the sole aim of distributing a percentage

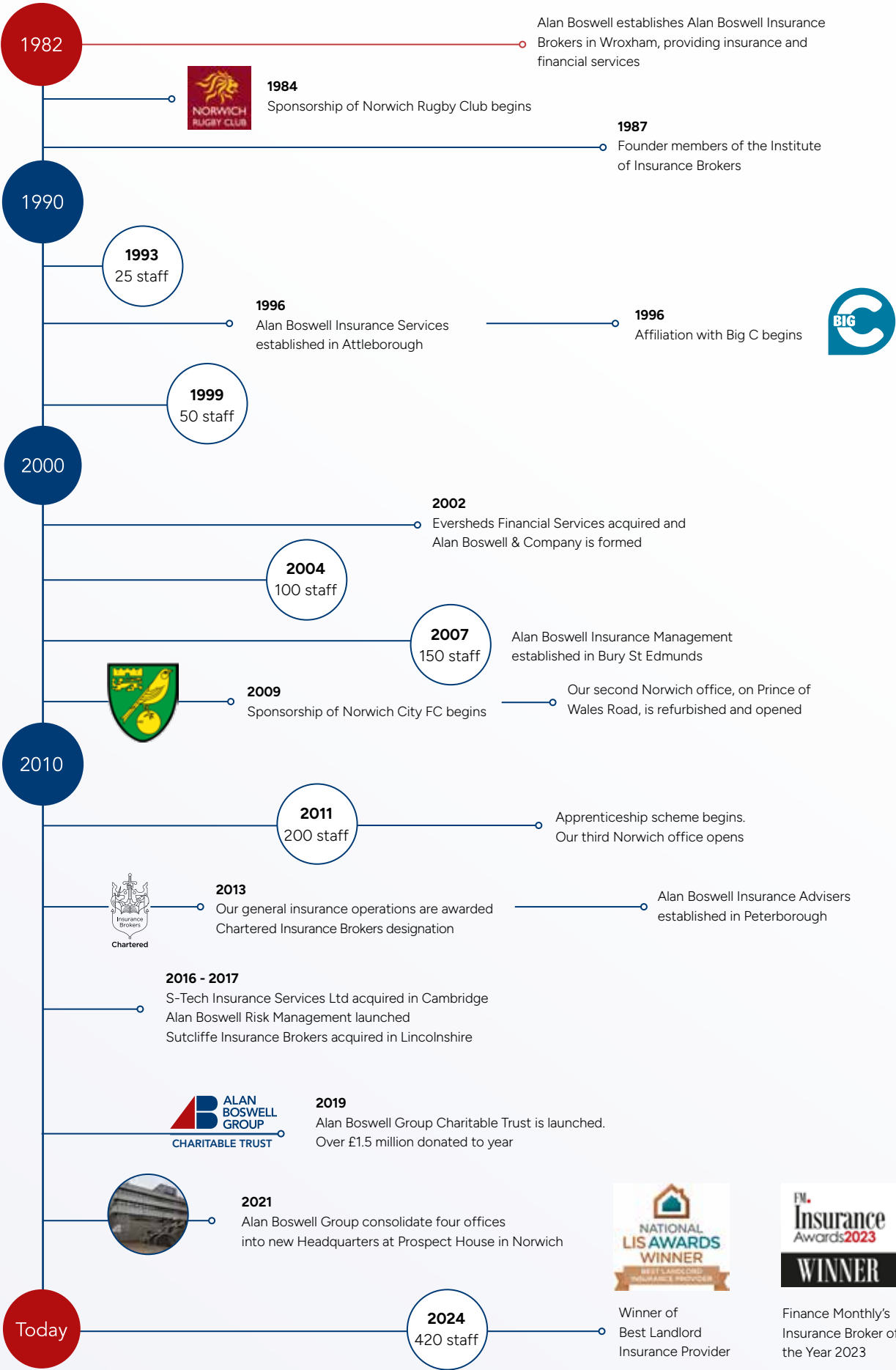
of company profits to local good causes.

Over the last five years the Trust has awarded over £3m in grants to charities and community organisations across the East of England. The Trust has supported many causes including mental health charities, the elderly community, children's charities, and animal welfare organisations.

We are also corporate sponsors of several organisations including Norfolk Wildlife Trust, Norwich City Football Club, Bury Rugby Club, The Cambridgeshire Women & Girls' County Football League, Cambridge United Football Club and Peterborough United Football Club.

As we continue to grow, so will our support for our communities.

## Our history





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Don't hesitate to give us a call  
whenever you have a question  
about insurance or financial services.  
We're happy to help however we can.

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Alan Boswell,  
Executive Chairman

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