



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ Commercial Finance
- ▶ Financial Services
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ [CLICK here to exit](#)

Tailor Made Financial Solutions

# A warm welcome



Robert Worrell ACII  
Chartered Insurance Broker  
Group Managing Director

“May I extend to you a very warm welcome to our most recent brochure, reflecting yet another key stage in our evolution – formation of a bespoke Group proposition delivering a dedicated client centric risk solution service.

This is a direct response to the increasingly complex and demanding challenges facing our clients and is delivered by an innovative and energetic team of empowered people experienced and recognised in their individual disciplines.

We realise that for our business to prosper, we must tirelessly achieve “best value” for clients in order to preserve and advance their prosperity – in essence, a partnership, with our fortunes being inextricably linked. This philosophy clarifies our focus and whilst underpinned by our independence, creates a stakeholder status generating mutual value.

We hope that some or all of our services will be of benefit to you. Please read on to understand more as to how we aim to champion your cause.

On behalf of all our team, we look forward to working closely with you in the future.”



Please use the navigation below:

- ▶ [Warm Welcome](#)
- ▶ [Insurance Broking](#)
- ▶ [Schemes & Affinity](#)
- ▶ [TIP Claims Advantage](#)
- ▶ [Private Client Management](#)
- ▶ [Commercial Finance](#)
- ▶ [Financial Services](#)
- ▶ [Health](#)
- ▶ [Risk Services](#)
- ▶ [Contact us](#)

▶ [CLICK here to exit](#)

# Guiding you through the process

**Being in business is about taking risks. Running a successful business is about managing those risks.**

The Insurance Partnership Insurance Brokers is a fully independent and authorised insurance broker. Our success is based on the amalgamation of old and new business principles to provide client-focused solutions.

We still believe that insurance is a 'people' business. We have the right people to deliver a personalised service-driven strategy, dovetailed to each of our clients' requirements.

The services which we provide are wide-ranging, from Corporate Insurance - which can involve multi-national complex insurance programmes with captive and self insurance - to bespoke Commercial Insurance offerings.

We also know that it is not just about having good products but about the delivery. You can be assured that our team of professionals will be with you every step of the way, advising you and working in partnership to design a programme specific to your needs.

The Insurance Partnership is committed to the delivery of a first class service and being of value to you.



Please use the navigation below:

- Warm Welcome
- Insurance Broking
- Schemes & Affinity
- TIP Claims Advantage
- Private Client Management
- Commercial Finance
- Financial Services
- Health
- Risk Services
- Contact us

► CLICK here to exit

# Strength in Numbers

A bespoke service for organisations, associations and groups of individuals or companies with a common buying interest.

Whether you are a collection of like-minded individuals, a professional group or trade based organisation, we can help you to unlock the potential in your membership.

Our forward thinking approach harnesses the buying power of organisations and groups to create insurance products tailored to meet specific needs and interests of their members.

Our dedicated schemes team offers a professional bespoke service. From initial enquiry, advice and guidance through to policy issue, our team will take care of you and your members.

Knowledge and expertise are at the fore front of our offering and our “in house” underwriting and claims facilities mean that we can react quickly to the changing needs of our clients whilst remaining at the forefront of claims settlement, policy cover and service delivery.

Our aim is to help organisations retain their members and attract new ones, creating loyalty and adding real value by providing real member benefits.

We start by listening....so ask us how we can help you to get the most out of your membership.



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ Commercial Finance
- ▶ Financial Services
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ [CLICK here to exit](#)

# At the time you need us most

Our Claims Service is the backbone of our proposition. Whether you are at the mercy of a major disaster or facing the inconvenience of a small claim, our teams' professional, efficient and timely support will be there when you need it most.

We boast one of the most experienced and hands on claims teams, ensuring that in the event of a major loss, your business is back up and running as soon as possible and that all claims, no matter how big or small, are dealt with swiftly and efficiently and with little disruption.

Our claims delivery is further supported with Harris Balcombe Loss Assessors to provide a 24hr emergency support line and technical expertise in material damage and business interruption claims.

As your insurance broker we will always be there to help and assist during these difficult times, but the additional technical expertise and claims efficiency our partners Harris Balcombe bring is of massive value to you.



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ Commercial Finance
- ▶ Financial Services
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ CLICK here to exit



# A service to reflect your lifestyle

We appreciate the lifestyle of high net worth and executive home owners and work with a panel of specialist insurers who understand the risks associated with properties such as these.

Whether your property is thatched, period, grade I listed, timber framed or modern, we understand that it's not just a house it is your home.

We see it as our role to ensure that you receive superior levels of protection so that you can keep your properties, antiques, fine art and jewellery just the way you want them. Your house is more than just a roof over your head so it is also covered for features that give a home its character: corncicing, plasterwork, murals and fire surrounds as well as tennis courts, swimming pools, gates and outbuildings.

Our policies also have the necessary extensions to ensure that the cover embraces your lifestyle:

- Annual travel including winter sports
- Worldwide cover for your possessions
- Fine art valuables and jewellery
- Holiday homes abroad
- Working from home

After taking the time to understand you and your lifestyle, our specialist can then provide you with bespoke solutions tailor made to your exact requirements.



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ Commercial Finance
- ▶ Financial Services
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ [CLICK here to exit](#)

# Keeping your cash flowing

The world of finance is complex. However, whether you require a full financial review, need cash-flow finance or are looking to raise additional capital, our process is simple: we listen, understand and then provide solutions.

Our expertise crosses all trades and sectors and, in addition to the help we can provide regarding standard asset finance and commercial mortgages, we offer assistance in every aspect of commercial funding.

We can arrange help with:

- Asset Finance
- Commercial Mortgage
- MBO/ MBI
- Cash-Flow Finance
- Capital Raising
- Banking Solutions and Reviews
- Non- Status Finance Banking Solutions and Reviews
- Pension Fund Loans
- Start-up Capital & Loans
- Vehicle Contract Hire
- Adverse Credit

We have access to a wide range of finance providers from multinational banks through to boutique specialist funders. We can provide a “whole of market” appraisal of your requirement offering a unique ability to access funding not generally available through normal banking connections.

Our Commercial Finance team are experienced professionals, having served many years in the commercial banking and finance sectors and know how to “craft” your proposition to achieve the best possible funding terms for you.



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ **Commercial Finance**
- ▶ Financial Services
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ [CLICK here to exit](#)

# Focused on money matters

Taking financial advice could be the most important thing you'll ever do for yourself, your family or your business. It can save you money, make you money, protect your finances, and, most importantly, sound financial advice can prepare you for whatever life has in store.

The Insurance Partnership's team of professionals can provide you with qualified independent advice giving you the guidance and confidence that your hard-earned money is invested correctly and that you, your family and key people in your business are protected.

## **Investment and inheritance tax planning**

You can rely on our independent expertise to assess your inheritance tax position and guide you through the wide range of options that are available in the complex area of investing money. Our tailor-made solution will link to your attitude to risk and to your requirements for income or growth. Our team can also assess your existing investments and throughout the process we will provide full transparency, professionalism and support. One of our key issues is ensuring that your existing arrangements also need to be constantly reviewed.

## **Corporate and personal pensions**

Our qualified team has a wealth of expertise and experience in providing employee benefits and pensions solutions and will ensure that your business complies with new pension regulations that come into effect in 2012. We can provide advice on a range of issues including pension planning, covering every aspect from self-invested pensions, group personal pensions, stakeholder pensions, final salary schemes, directors' pensions to retirement options. We can review your organisation's existing arrangements and schemes – which may no longer offer an appropriate level of value.

## **People insurance**

Insuring the key people within your organisation such as your directors, shareholders and partners is essential. We can put in place a bespoke Business Survival Package that fulfils all of your organisation's needs that will help your company to continue operating whatever the circumstance.



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ Commercial Finance
- ▶ **Financial Services**
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ [CLICK here to exit](#)

# Listening to your policy needs

Our team of experts recognises on a personal basis the benefits of Private Medical Cover and that when you, or people special to you, are ill or in pain, immediate attention is important.

From a business angle, we fully understand the importance of ensuring that your business and your employees are performing at their peak. Should you run your own business and the worst happen your income can be affected and your business seriously disrupted by your inability to work.

We have strong working relationships with all major medical insurers and specialist underwriters and will work closely with you to provide a full range of bespoke, viable cover that meets your needs.

We can arrange:

- Private Medical Insurance
- Health Cash Plans
- Dental Plans
- Occupational Health Services
- Employee Assistance Programmes
- Absence Management Systems
- International Private Medical Insurance
- Business Travel Insurance

Let the specialists help in finding you the right cover at the right cost.



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ Commercial Finance
- ▶ Financial Services
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ CLICK here to exit

# Providing the perfect cover

Our Risk Services team provides a wide range of crucial services to businesses in the areas of Health and Safety, Risk Management, Human Resources and Employment Law.

We believe that business organisations deserve to have a partner who will take a fresh approach. We always challenge the status quo in order to create new and better ways to serve our clients' best interests. We also understand that the control of overheads is critical for every business, ensuring at all times that our pricing is extremely cost-effective.

In a business like ours, the ultimate test will always be client service and we are underpinned by a culture and ethos that ensures that at all times we are passionate about our hard-earned reputation for putting our clients first.

Our advisory team is carefully selected to ensure they have proven hands-on experience of your business and the issues you face. We will establish a sound health and safety management system to suit your business and review your current Human Resources documentation and procedures, followed by preparation of documentation. We will then maintain your system and documentation at regular intervals in order to ensure compliance with the requirements of legislation.

We provide a varied number of support packages, freeing up your time to concentrate on your core activities, which cost-effectively ensures that your documentation is kept up to date and that your working practices comply with the requirements of the law.

We operate throughout the UK and are proud that our clients include many small to medium-sized companies as well as some of the UK's leading businesses.



Please use the navigation below:

- ▶ Warm Welcome
- ▶ Insurance Broking
- ▶ Schemes & Affinity
- ▶ TIP Claims Advantage
- ▶ Private Client Management
- ▶ Commercial Finance
- ▶ Financial Services
- ▶ Health
- ▶ Risk Services
- ▶ Contact us

▶ [CLICK here to exit](#)

# Covering all the bases

The Insurance Partnership is more than just an insurance broker, we are constantly striving to provide additional services to our clients which protect and add value with professionalism and expertise. In this ever changing complex business environment it's more important than ever to choose professionals that complement your business and who will be there for you when you need that support.

The Insurance Partnership was created for our clients and our service is dedicated to you.

We look forward to hearing and working with you.

#### **Hull Office**

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The Insurance Partnership Insurance Brokers is a trading name of the Insurance Partnership Services Limited. Authorised and Regulated by the Financial Services Authority No 312916.

The Insurance Partnership Health Solutions is a trading name of the Insurance Partnership Services Limited. Authorised and Regulated by the Financial Services Authority No 312916.

The Insurance Partnership Financial Services Limited is Authorised and Regulated by the Financial Services Authority No 232445.

The Insurance Partnership Commercial Finance Limited is a member of the National Association of Commercial Finance Brokers (NACFB) and are Registered Credit Brokers – Licence No 613861



Please use the navigation below:

- ▶ [Warm Welcome](#)
- ▶ [Insurance Broking](#)
- ▶ [Schemes & Affinity](#)
- ▶ [TIP Claims Advantage](#)
- ▶ [Private Client Management](#)
- ▶ [Commercial Finance](#)
- ▶ [Financial Services](#)
- ▶ [Health](#)
- ▶ [Risk Services](#)
- ▶ [Contact us](#)

▶ [CLICK here to exit](#)