



AAP & LaVista

Professional Indemnity Update

Presented by David Withers
Managing Principal Corporate Services



Contents

- 01. General Financial Planners Professional Indemnity Market
- 02. Special Offer from PSC Insurance Brokers to LaVista Licensees
- 03. Our Credentials

Financial Planners PI - Update

There are currently 10 insurers in the Financial Planners PI market

We have seen an easing of cover conditions around margin lending and SMSF advice

We have seen premium discounting in a soft market up to 25% on prior year premium



Run-off
cover
conditions
have
improved



Our clients
are finding
positive
outcomes at
AFCA



Acquisition
activity is
increasing in
the industry

Special PI Offering To LaVista Licensees





Regulatory
Compliant
Wording and
recognized ASIC
Guidelines.



Cover for all your
authorised
representatives



Cover for legal
defence costs and
representative costs
for regulatory
enquiries



Claims made policy
with retroactive
cover.

PSC Insurance & Newline

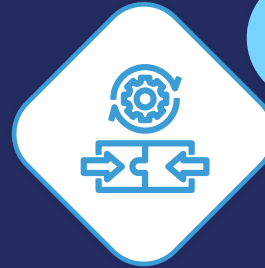
Partnering to provide an exclusive offer to LaVista Licensees

The goal of this new insurance program is to provide an industry-competitive insurance solution by marrying AAP's risk management and quality assurance techniques with a Professional Indemnity product, to secure long term benefits for the AAP member base.

Benefits of this PSC and Newline Professional Indemnity Offering



A streamlined quotation process



PI Cover that supports your business and delivers strong protection at a competitive rate



A stress-free renewal with early notification and less paperwork



Up to 20% discount from the technical underwriting price



David has over 25 years of combined experience in the UK and Australian insurance markets with broad industry networked knowledge.

Brooke has worked for 18 years as both an underwriter and broker in Australia



Credentials

Prepared for:
LaVista Self Licencees
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THANK YOU

We look forward to discussing your needs in greater detail



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