

**Acre x Uinsure**



# Our proposition

A unique solution with multiple underwriters competing to give your customers the best price on the same policy.

## Claims

A **single end to end customer experience** with a UK based claims team that's net promoter score excels against industry average.

## Service

Customers give us high ratings on Trust Pilot, with an average of **4.8 out of 5 stars**, demonstrating the satisfaction level of our policy holders.

## Product

Uinsure's policy is rated **5 Stars by Defaqto**, which means it meets the highest standards in the industry.

## Speed

Getting a quote and applying for the policy, with just **three questions and 60 seconds to apply**. Our quotes are valid for 120 days.

## Price

Our **panel of insurers** compete to offer the best price so your customers will always be treated with fairness. **We don't charge any fees** to cancel or make mid-term adjustments.

## Retention

**90% of customers stay with us** at renewal. Our rebroke process is unique in the market and makes sure premiums remain competitive.

# Delivering value in a digital world.



**Three quarters** of advised clients will go outside of the intermediary market to buy their home insurance.

totaling c.675,000 unserved clients per year.

(even though it's a requirement of the mortgage).

Customer does it

**Acre DA Ltd 2 [Test]**  
FCA Register Number: 3

- Company information
- Mortgage fees
- Users
- User groups
- Process
- Mortgage panel
- Panels**
- Templates
- Regulatory

### Home insurance

Do you advise on general insurance?  Yes  No

### Which panels do you use?

- Uinsure
- Enable auto refer to Uinsure

**What is auto-refer?**

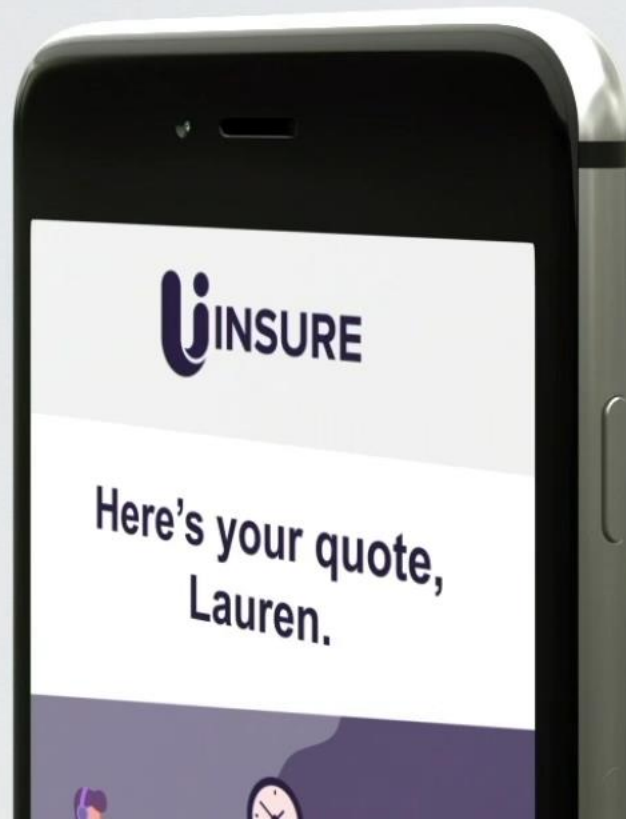
When auto-refer is selected, we will automatically refer any case once a mortgage has been applied for where GI has not been sold or referred and the broker has not stated that the customer does not require insurance.

- Paymentshield

Branch number  [Show](#)

## Enable auto refer to Uinsure

- Principals can enable auto refer for so that cases are sent to us at 'Application Submitted'
- This will only be for cases where GI has not been sold or referred and the broker has not stated that the customer does not require insurance.
- You can still provide advice at any time before "Application Submitted" and these clients will be removed from the Auto Refer functionality.



# Let your customers do it.

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UinsureCX within Acre will ensure that your customers receive a personalised quote at key moments in their mortgage journey.



# Try it for yourself...

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Using milestones to trigger automated communications at key moments in your client's home buying journey.

For example: Case Submitted, Offer, Exchange and completion.



**Scan the QR code**

to experience our  
technology for  
yourself.

Enter DOB 14/01/1984  
**when prompted.**





## Referral progress

It's important to us that we keep you up to date with the progress of the referrals you have sent to Uinsure. Click the referral below to see a summary of the referral and the communication history or create a new referral.

Refer a client

Reference Search

Client Name Search

Adviser name All

Status All

Reset

Search

### Standard Home & B2L/Landlords

Reference	Date	Client	Adviser	Contact history ?	Mortgage progress ?	Insurance status	
URAE07542731	24/10/2020	Clive Neversmith	John Bolton	-  -  -		Referral in progress	...
URAE07542999	22/10/2020	Nic Kyle	Hilary Brentwood	5  1  2		Referral - Policy sold	View summary Request update
URAE07542662	22/10/2020	Lauren Peters	Hilary Brentwood	3  -  1		Referral in progress	
URAE07542880	22/10/2020	Maggie Combe	Peter Jackson	-  1  -	No mortgage progress data available	Referral - Policy not sold	
URAE07542001	22/10/2020	Graham Poll	Peter Jackson	1  1  2		Referral - Policy submitted	...

Last call: 06/02/2021  
Next call: No call scheduled

Show more

Current stage: Completion  
Last updated: 08/04/2020

### Non Standard Home

Reference	Date	Client	Adviser	Person to contact	Update	Last update	Insurance status	
URAE07542066	24/10/2020	Martin Schultheiss	Peter Newcastle	Adviser	-	-	Referral in progress	...
URAE07542317	22/10/2020	Liam Crocken	Lewis Smith-Rowe	Client	3	06/02/2021 13:05	Referral - Policy submitted	...
URAE07542000	22/10/2020	Nathan Camps	Peter Kay	Client	1	01/02/2021 11:09	Referral in progress	...

# Transparency.

Real time view of the progress of each referral, contact made and discussions held.

You do it

Cases compliance Clients Reminders Reports Quick Source Introducers Accounting

Search

Cases Board List

Sort by Reminders due Advisor Status Case Types Lenders Introducers

Created date (Ne... Select... Fatma Kemal 8 selected Select... Select... Select...

Reset all Apply filters

Pre-recommendation Pre-application Submitted Offered

Julia Bentkey Pre-recommendation

Case type Remortgage  
Case owner Fatma Kemal  
Loan amount £140,000  
Introducer -  
10 days 0

Christopher Cave Pre-application

Case type Remortgage  
Case owner Fatma Kemal  
Loan amount £100,000  
Introducer -  
9 days 0

## Linking my Uinsure Account to Acre

- Navigate to the settings section in the left navigation menu.
- Select 'My Settings'
- Navigate to the Uinsure box and input your Uinsure Username and Password.
- Don't forget to hit 'Save Changes'

Nicole Wheeler's settings

Credentials

Email & calendar

Save changes

Add your protection login details

iPipeline (Assureweb)  
This will be your Assureweb login details, this should start with web\*\*\*\*

Username web1042285

Password \*\*\*\*\* Show

Credentials valid

Home insurance login details

Uinsure

Email address

Password

Dashboard **Cases** Cases compliance Clients Reminders Reports Quick Source Introducers Accounting

**FTB or Purchase only**  
Raymond Smith

Pre-recommendation

Overview

Fact find

**Sourcing**

Preferences

Mortgage sourcing

Products

Home insurance

Suitability

Documents

Contacts



Accounting

Notes

Show missing

Send to adviser

### Refer and Earn with Uinsure



Acre has partnered with Uinsure to help you fulfil your Home Insurance advice obligations to clients by referral, giving you the benefit of a great commission without the work of selling insurance yourself.

And with Defaqto Five Star rated coverage, you can rest assured that your clients will be receiving the cover they need at a great price.

**Your referral bonus** **17.5%**  
(if your customer takes out insurance)

[My customer does not want advice](#) [Refer now](#)

#### Why refer to Uinsure?

- Generate commission with all self-fulfilment applications
- Meet customers where they buy today, digitally
- Uinsure's platform is easier, quicker and more convenient vs price comparison sites
- Applications take around a minute; no tough questions
- Smart communications means your client is offered home insurance at the right time
- Protect wider revenue streams by not sending clients and their data to comparison sites
- Expert customer care for your client at every step of their journey

### Or sell it yourself

**Insurance type**  Contents only  Buildings and contents

**Cover**

Desired excess  [Set separate excesses](#)

Claim free years

**High value items**

[+ Add high value item](#)

**Features**

- Personal possessions cover
- Accidental damage cover
- £100k contents limit
- Family legal protection
- Home emergency cover














# Generating a Uinsure Quote

- Navigate to 'Sourcing' followed by the 'Home Insurance' section using the left navigation menu.
- Once selected you'll be able to either "quote and apply"
- The system will then use the information that has already been added to the client fact find.

7 quotes

Commission 27.5% ▼

ⓘ Because of the selected options, paymentshield was not able to quote for this case

Underwriter	12 monthly payments	1 annual payment	Defaqt rating	
	£32.06 / month	£343.53 / year		<a href="#">Recommend</a>
	£32.31 / month	£346.19 / year		<a href="#">Recommend</a>
	£33.26 / month	£356.40 / year		<a href="#">Recommend</a>
	£37.37 / month	£400.39 / year		<a href="#">Recommend</a>
	£42.16 / month	£451.66 / year		<a href="#">Recommend</a>
	£43.73 / month	£468.51 / year		<a href="#">Recommend</a>
	£44.73 / month	£479.29 / year		<a href="#">Recommend</a>



## Recommending a product

- Once you've configured your cover options, quotes will appear underneath the filter options.
- Once you have located the product you wish to proceed with, select the 'Recommend' button next to the product.

## Recommended product

Insurance type: Buildings and contents  
Excess: £250  
Legal expenses cover: Not included  
Personal possessions cover: Not included  
Accidental damage cover: Not included

[Remove recommendation](#)

Underwriter	12 monthly payments	1 annual payment	Defaqto rating	
	£32.49 / month	£348.14 / year		<input type="button" value="Apply"/>

## Assumptions

Please carefully read and check that each of the following statements is true before continuing.

### The property

1. will be permanently occupied by you and your family and by no more than one lodger

2. will be maintained in a good state of repair

3. has a roof which is built from slate or tiles

4. has walls which are built from brick (which includes brick clad with timber frame properties built from 1980 onwards), stone or concrete (excluding prefabricated concrete)

All of the above statements are true

Yes

No

# Applying for a product

- Once you have recommended a product, the other products will disappear and the 'Recommend' button will be replaced with an 'Apply' button. Proceed by selecting 'Apply'.

We do it



FTB or Purchase only  
Raymond Smith

Pre-recommendation

Overview

Fact find

**Sourcing**

Preferences

Mortgage sourcing

Products

Home insurance

Suitability

Documents

Contacts

Accounting

Notes

Show missing

Send to adviser

### Refer and Earn with Uinsure



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### Or sell it yourself

#### Insurance type

Contents only

Buildings and contents

#### Cover

Desired excess

[Set separate excesses](#)

Claim free years

#### High value items

[+ Add high value item](#)

#### Features

- Personal possessions cover
- Accidental damage cover
- £100k contents limit
- Family legal protection
- Home emergency cover

# Generating a Uinsure Quote

- Navigate to 'Sourcing' followed by the 'Home Insurance' section using the left navigation menu.
- Once selected you'll be able to manually refer a customer to ourselves.
- Simply, select a date and time that you would like us to call your customer and we'll give them a call to provide GI advice.





FTB or Purchase only  
Raymond Smith

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Referral status

The case has been referred to Uinsure as requested. You can check back to view the status here at any time.

Date	Status	Message
2022-03-28 10:32:06	Refer and Earn Quote created	We have received your referral and will be in touch shortly.

[Cancel referral](#)

Or sell it yourself

Insurance type  Contents only  Buildings and contents

Cover

Desired excess £250

[Set separate excesses](#)

Claim free years 0

High value items

[+ Add high value item](#)

Features

- Personal possessions cover
- Accidental damage cover
- £100k contents limit
- Family legal protection
- Home emergency cover

# Call status updates

- All actions on the referral are then relayed back into Acre in the same Home Insurance section.
- Further detail can then be accessed within your Uinsure adviser platform



**UINSURE**

# Contact Us



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