guard.me International Insurance

REAL PEOPLE. REAL SOLUTIONS. REAL LIFE. REAL TALK.

Fact Find Form

Why a fact find is important: This Fact Find contains questions about your company's needs and circumstances. We, as your broker, need to know the answers to these questions in order to get a complete picture, so we can make recommendations to you that will be appropriate to your needs and objectives.

Company Information

Company Name: _____

Company Address: _____

City: _____ **Postal Code:** _____ **Country:** _____

Phone Number: _____ **Website:** _____

Preferred Invoice Name: _____

Owner Name: _____ **Owner Email Address:** _____

Portal Users (Note: each user of our Portal must have their own email address)

Main Contact			
First Name	**Last Name**	**Email**	**Access level Required (see notes)**
			Full Access
Finance Contact			
First Name	**Last Name**	**Email**	**Access level Required (see notes)**
			Full Access
Additional Contacts			
First Name	**Last Name**	**Email**	**Access level Required (see notes)**
			Full Access
			Full Access
			Full Access

Access Required Notes

Full access - Can access accounting, order and manage polices without restriction.
Accounting - Will have access to invoices and billing though Portal.
Administrator without Accounting - Can access policy documents and Drive but cannot access invoices.
Junior Administrator - Read and Print ID card only. Limited access to Certificates of Insurance and Drive only.

Guard.me International Insurance Services Limited is regulated by Financial Conduct Authority.

Registered in United Kingdom No. 06844799

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Please tell us about your company and the students you serve. This information is for our use only and will be kept confidential. All data is processed as per our Privacy Policy (guardme.ie/information/privacy-notice)

1. What services do you offer your clients?

- ☐ Educational Course Provider
- ☐ Agency (place students in educational courses)
- ☐ Guardianship
- ☐ Other

2. How many students do you send abroad / receive each year? _____

How many student weeks is the average trip duration? _____

3. Where do you send your students (for agents only)?

- ☐ Ireland
- ☐ Europe
- ☐ UK
- ☐ USA
- ☐ Canada
- ☐ Rest of World

4. What are the most common Home Country's of your students?

_____

5. What ages are your students?

- ☐ Under 14
- ☐ 14 - 17
- ☐ 18 - 25
- ☐ 25 - 45
- ☐ Over 45

6. Do your students attend: Language School, University / College, High-School, Cultural Trips, Internships, Erasmus / Turing, Other

- ☐ Language Schools
- ☐ High-School
- ☐ University/College
- ☐ Internships
- ☐ Erasmus
- ☐ Other

7. What is your refund / cancellation policy? (Please attach a copy)

8. Would you be interested in a policy that provides cover to your staff on their business travel trips?

9. Do you currently work with other travel or health insurance providers?

☐ Yes (please list) ☐ No

1 - Name: _____

Address: _____

_____

Product(s): _____

2 - Name: _____

Address: _____

_____

Product(s): _____

10. Are you a member of or registered with any professional associations?

☐ Yes (please list) ☐ No

_____

_____

_____

_____

_____

I confirm that this document has been completed accurately to the best of my knowledge and I understand the answers I have provided on this form will impact the products that are recommended to me by guard.me.

_____ _____

Signature Date

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