



In-house for intermediaries

brownejacobson^{LLP}

Introducing Instant In-House for insurance intermediaries	01
How it works	02
What can be included?	04
What makes us stand out?	06
About Browne Jacobson	07
Contact us	08
Our offices	09

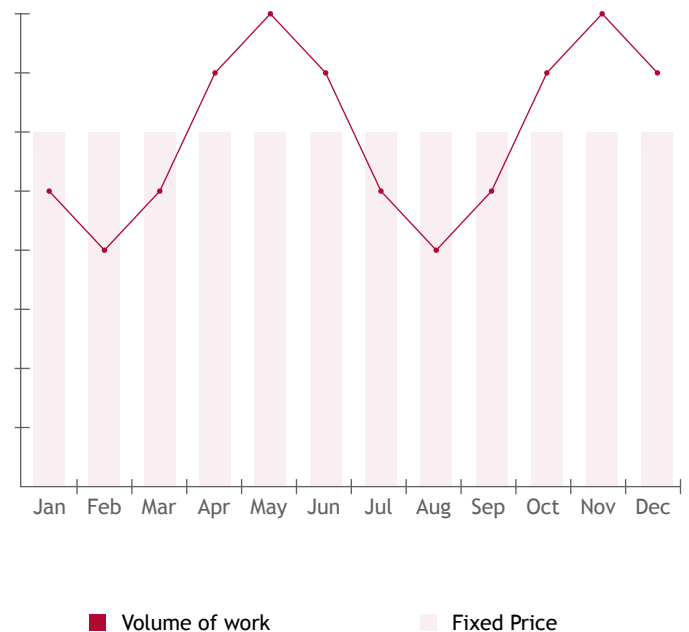
Introducing Instant In-House for insurance intermediaries

We understand the key considerations clients face when determining how best to resource varying volumes of legal and compliance work.

Instant In-House is a bespoke retainer service for insurance intermediaries which provides instant access to a team of lawyers and compliance specialists for a fixed fee.

The team that we offer will be carefully selected having regard to your specific requirements and can work with you remotely or at your offices.

This model allows us to deliver our advice quickly, with a deeper insight into your business, and more cost-effectively than if we were to work on traditional hourly rates.



How it works

We set up your bespoke retainer package in three stages

1

We do the work getting to know you and putting a team in place – free of charge

- We provide an initial telephone consultation free of charge, providing us with an opportunity to better understand your requirements.
- You will be allocated a client partner, responsible for you as a client, and a dedicated client relationship manager to serve as your daily point of contact. Your client relationship manager will get up to speed with your business and your requirements quickly.
- As part of this process we are happy to invest time up-front speaking to stakeholders, considering key issues, and prioritising the work to be undertaken.

2

We agree your bespoke retainer

- Following your initial consultation, we will provide you with a proposal setting out our suggested scope of work, the team who you will be working with and a pricing model which is clear and straightforward.

3

We get to work

- From that point on, you and your wider team will be able to call upon our services, treating us as an extension of your in-house legal and compliance team.
- You won't have to worry about obtaining fee estimates, agreeing fixed fees, or other formalities and we will agree with you a process for reviewing the arrangement on a regular basis to ensure that the retainer is delivering excellent value.

“You go straight to the questions that I actually need the answer to... So very practical and you get to an answer much faster because of it, and understand that we have stakeholders that we need to communicate well with...”

Group Chief Risk Officer, Independent Chartered Insurance Broker



What can be included?

Your carefully scoped, bespoke retainer package will be unique to you and tailored to the needs of your business. We have set out below a few examples of the types of services typically included in our bespoke retainer arrangements:

- **Compliance queries** – responding to compliance queries, including relating to FCA permissions, client money and compliance with ICOBS, IDD and the FCA Handbook
 - **Commercial contracts** – reviewing contracts with customers, insurers and others, including binders, TOBAs and Appointed Representative Agreements
 - **Advertising & marketing** – advice in relation to product claims and promotions
 - **Employment & HR services** – advice on all employment issues including variations to contracts and terminations of employment, taking into account any SMCR considerations
 - **Intellectual property** – including strategic IP advice and exploitation agreements (but typically excluding filing and prosecution work, and IP disputes)
 - **Corporate governance and company secretarial**
 - **Preliminary advice on disputes** (typically delivering a preliminary assessment of our client's position, and advising up to sending a letter before action)
 - **Property**
- This list is by no means exhaustive, so if you have something else in mind, please just let us know.



What can be included?

(Cont.)

We will always offer you:

- **A dedicated Client Relationship Manager (CRM)** – an experienced solicitor who is readily available as your daily point of contact. The CRM will act as a triage service for new instructions, identifying the relevant practice area specialist, and managing the delivery of our advice to ensure you receive the same, consistently high, standard of service irrespective of who undertakes the work.
- **Monthly reporting** – a report setting out the current status of each matter undertaken under the retainer during the current reporting period.
- **Regular review meetings** – your client Partner would review your retainer with you at regular intervals (typically monthly or quarterly) to ensure you are getting best value, and to provide flexibility should your needs change.
- **Added value** – as part of agreeing of your retainer arrangement, we can offer a complimentary program of free legal training which is tailored having regard to your business.



“What you end up with is a real partnership [with] us and Browne Jacobson. It feels like the solution is our solution, not something that’s been imposed on us blindly by the lawyers. ”

Group Chief Risk Officer, Independent Chartered Insurance Broker

What makes us stand out?

Ten reasons you'll never look back:

1. Straightforward

A package based on what you need when you need it, not what you don't.

2. In-house experience

Extensive legal knowledge backed by in-depth insurance industry experience with many of our team having worked in-house or spent extended period on secondment to businesses in the insurance sector.

3. Certainty on fees

Plan your budget on legal spend for each financial year.

4. Reduced administration

With Instant In-House you get responsive, timely advice when you need it, and we don't spend time on the administrative tasks that don't add value.

There is no need to set up new matters, agree terms of engagement and agree fees for each individual piece of work. Your admin is significantly reduced and dealt with up front.

5. A single point of contact who knows you and your team

In addition to a client partner, we provide you with a client relationship manager to act as your primary point of contact. They can be available to visit you at your offices and can be available to attend key meetings when you need them. They would understand your business and share that knowledge with anybody else who they engage to deliver advice to you.

6. Full-service team

With over 400 legal experts across our wider firm, your client relationship manager can leverage a breadth and depth of experience far greater than most in-house teams.

7. A complete global solution

We are a member of the Harmonie network, an international network of insurance law firms and maintain close working relationships with other overseas law firms to ensure that we can meet our client's legal requirements, wherever they may be.

8. One-stop solution

With our instant in house solution, we are able to join up compliance advice with legal solutions, often meaning you do not need to engage separate compliance consultants and lawyers.

9. Outstanding service

We find that reduced administration means that we are able to respond and deliver our advice much more quickly. We can also agree service levels to meet your particular requirements.

10. Reporting and management information

We provide you with regular, monthly reporting to keep you updated on all your ongoing instructions.

About Browne Jacobson

We are a national law firm with a full-service commercial offering. Our clients choose us because of our sector expertise, straightforward advice, pricing and product innovation and exceptional client service. We don't just say it, we do it — here's why you'll want to work with us:

- **Sector experts, working in partnership with our insurance sector clients** — including insurers, MGAs, brokers, broker networks and other intermediaries.
- **Specialists in legal solutions across the insurance sector**, providing a unique offering where they overlap.
- **National presence from our offices in major UK cities** including Birmingham, Exeter, London, Manchester and Nottingham.
- **Plugged into your sector** — we work closely with key industry bodies, including BIBA and the MGAA, both of which we are associate members.
- **Recognised for our quality** and externally accredited by Lexcel, ISO, and Investor in Customers.



Contact us



Tim Johnson
Insurance

tim.johnson
@brownejacobson.com
+44 (0)115 976 6557

“To Browne Jacobson who have the perfect combination of specialist expertise, insurance sector knowledge and commitment to delivering fantastic service level that we value so highly. It was great to have them as part of our team.”

Ashwin Mistry, Co-Founder and Executive Chairman of
Brokerbility and BHIB Insurance Brokers



Our offices

Birmingham

Victoria Square House
Victoria Square
Birmingham B2 4BU
+44 (0)121 237 3900

Exeter

1st Floor
The Mount
72 Paris Street
Exeter EX1 2JY
+44 (0)1392 458800

London

15th Floor
6 Bevis Marks
London EC3A 7BA
+44 (0)20 7337 1000

Manchester

3rd Floor
No.1 Spinningfields
1 Hardman Square
Spinningfields
Manchester M3 3EB
+44 (0)370 270 6000

Nottingham

Mowbray House
Castle Meadow Road
Nottingham NG2 1BJ
+44 (0)370 270 6000



brownejacobson.com
0370 270 6000

Birmingham | Exeter | London | Manchester | Nottingham