Account Management

Become a Member

Receive Agency Pack

Account Managers will contact you to introduce themselves and answer any questions.

As much or as little training and assistance is available to you from your dedicated Account Manager.

Great we like each other!

You will be issued with a unique access code to our Trading Platform.

All your financial details will be registered for commission payments to transact straight to your account at the end of each trading month.

Account Management Touch Points

Induction & Training

Monthly Review

Quarterly Trading Review

Annual Profit Review

Set up your Grapevine Account which provides training for our products as well as FSA regulations.

Monthly review call from your Account Manager to assist with any outstanding matters or items relevant to your account.

This review is based from Management Information on underwriting, claims, profit and loss and business levels.

End of year review to allow both parties to assess the partnership, business levels and business satisfaction.

The purpose of setting out our Account Management Strategy is to offer a personal and friendly approach to helping you achieve business goals and ambitions. We can accommodate as little or as much assistance as you wish to engage in. With the close working relationship outlined we believe our mutual goals can be achieved.