

Consulting Agreement for the Review of the Client's Insurance Portfolio

The Client

Name

Street, No.

Postal Code / City

Phone number

E-Mail

The Client hereby appoints the undersigned Broker to review the above-mentioned insurance areas and grants the Broker the authority to carry out the following activities in this regard:

- Obtain the information required for the preparation of insurance quotations from the current insurance companies (e.g. claims history);
- Obtain quotations from the insurance companies requested by the Client;
- Compare quotations and submit recommendations and proposals to the Client.

The undersigned Broker shall safeguard the interests of the Client with due care and diligence and shall be liable to the Client for any damage arising from a breach of such duty of care. The Broker is not authorised to accept claim payments. The Broker shall at all times act in the best interests of the Client. Any data received from the Client and/or insurance companies for the purpose of executing this assignment shall be subject to confidentiality obligations under applicable data protection laws. The Broker shall maintain strict confidentiality towards third parties. For the purposes of this agreement, insurance companies with which the Broker communicates on behalf of the Client shall not be considered third parties. The data may only be used for the agreed purpose.

The Broker shall NOT receive any remuneration from the insurance companies for the consulting services provided under this assignment. This assignment does NOT replace the existing servicing responsibilities of any current insurance representatives or brokers.

Any tasks or services exceeding the scope of the ordinary brokerage mandate shall require prior mutual agreement and shall be remunerated by the Client on a fee basis. The applicable fee rate shall always be agreed in advance.

The undersigned Client is the policyholder and retains all rights and obligations arising from the insurance contracts. In particular, the Client acknowledges the obligation to answer all questions relevant to the conclusion of an insurance contract with an insurance company accurately, objectively and truthfully. This mandate shall enter into force upon signature and shall remain valid for three months or until revoked in writing by either party.

Place and Date

Place and Date

The Client

The Broker

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YOUR INSURANCE BROKER & FINANCIAL SERVICE PROVIDER.

