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# HSBC Life Protection

The protection your clients need. The business support you want.

From becoming a parent for the first time, to taking out that new mortgage, to retirement and thinking about their legacy, whatever life stage your client is at, we offer a selection of competitively-priced protection products designed to perfectly meet their needs – and yours.

## All HSBC Life protection products offer:

- ✓ **A streamlined underwriting process** that's simple and provides an instant decision
- ✓ **An efficient online-only journey** from initial quote to final cover
- ✓ No calls, **no medical examinations**, tele-interviews or doctor reports required
- ✓ On-hand **dedicated business development** team to support you and your business
- ✓ **Our empathetic, straightforward and efficient** claims process
- ✓ HSBC Life Online Health Services\*, an app-based service, for **expert medical** assistance and **wellbeing support**

\* The selection of health services, offered by Square Health, is a non-contractual benefit. The services provided are not part of the insurance cover your client's policies provide.

## Complete support for you and your business

HSBC Life has over 30 years of experience in the protection market. And we've learned that we can only succeed with you by our side. This is why we're committed to supporting Advisers

in every way we can – from smoother agency set-ups to quickly resetting that password you've forgotten. Because together, we all thrive.

## Meet the team

### Senior Business Development Managers

Every one of our Senior Business Development Managers has a wealth of sector experience and understands the particular demands and opportunities of their allocated region.

Their role is to help you and your business; whether that's identifying sales and planning opportunities, clarifying a particular product detail, or even providing CPD training to support ongoing learning and development.

### Head of HSBC Life Distribution

Mike Furniss

☎ 07584 401609

✉ michael.j.furniss@hsbc.com

Michael is a Fellow of the Personal Finance Society and Chartered Financial Planner. He leads our distribution team across the UK. He joined HSBC in May 2014 after a long career in Wealth Management and Private Banking commencing in 1995. He manages all key strategic accounts for HSBC Life (UK) Limited.

### London & South East

Joanne Robins

Senior Business Development Manager

☎ 07920 413560

✉ joanne.m.robins@hsbc.com

Joanne joined Midland Bank straight from school back in 1984 before it became part of HSBC. She has worked as an HSBC Financial Adviser for 12 years, managing both personal and corporate accounts.

### Digital Propositions

Peter Bayliss

Senior Business Strategy and Development Manager

☎ 07384 790556

✉ peter.j.bayliss@hsbc.co.uk

Peter has vast experience in the protection industry across B2B (including intermediaries) and B2C businesses. He joined HSBC in June 2019 after a long career with a protection provider and 5 years at a quotation portal company.

### South Wales, Midlands & South West

Richard Waters

Senior Business Development Manager

☎ 07771 841391

✉ richardwaters@hsbc.com

Richard is a recent addition to the HSBC Life team. He started his HSBC career nearly 27 years ago and had a number of senior roles in our Mortgage Intermediary and Group Insurance businesses.

### North Wales, North West & Northern Ireland

Claire Bostock

Senior Business Development Manager

☎ 07468 702823

✉ claire.l.bostock@hsbc.com

Claire joined HSBC Life in December 2017. She possesses a wealth of experience, having begun her career in the financial services industry over 20 years ago.

### Scotland, North East & East Midlands

Sally Dlaini

Senior Business Development Manager

☎ 07920 020882

✉ sally.dlaini@hsbc.com

Sally joined HSBC Life in February 2019. She began working at HSBC in 2003 after enrolling on a local management training programme. Sally has held several roles across the Retail, Wealth, Commercial Head Office, and Private Banking sectors.

### Distribution Support Team

Fast and efficient. We have a team in place for all your sales support, readily processing and completing new applications so that the onboarding experience is as smooth as possible.

Sarah Houselander

☎ 07387 248044

✉ lifebdmsupport@hsbc.co.uk

Gemma Hayns

☎ 07384 793309

✉ lifebdmsupport@hsbc.co.uk

### Administrative Support

For every urgent question. Whether you need an update on a new client application, have an issue with a direct debit or can't get onto HSBC Access, with our administrative support team there's always someone waiting to help.

☎ 0333 207 5563

Monday to Friday 9:00-5:30  
(closed bank holidays)

✉ support@lifeProtectionPlan.hsbc.co.uk

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# HSBC Access

The information you need, whenever you need it

## HSBC Access for advisers

HSBC Access enables you to simply manage all aspects of your business with us online, 24/7.

- ✓ View application statuses, including history of past applications
- ✓ Manage your profile and details
- ✓ Access your saved applications
- ✓ Keep track of your commission status and history



[www.life.protectionplan.hsbc.co.uk/broker/login](http://www.life.protectionplan.hsbc.co.uk/broker/login)

## HSBC Access for your clients

Your clients also have direct access to their policy via the HSBC Access portal. This enables them to manage their account online including:

- ✓ Downloading policy documents, trust documents and application summary
- ✓ Updating personal contact details and bank details
- ✓ Providing or updating GP details
- ✓ Contacting customer service via secure message
- ✓ Making a claim



[www.life.protectionplan.hsbc.co.uk/client/login](http://www.life.protectionplan.hsbc.co.uk/client/login)

For information on our HSBC Life protection solutions please visit [www.life.hsbc.co.uk](http://www.life.hsbc.co.uk)

For Financial Advisers only

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Together we thrive