

SMS TEMPLATES FOR BROKERS

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SMS 1 | Formal Approval/Loan Lodgement stages

Option A

Hi <insert client first name>,

Congratulations on your loan being approved!

As your broker, I have a duty of care to ensure you are set up for success and it'd be remiss of me not to discuss a protection solution.

We partner with **AIA Financial Wellbeing** who are experts in affordable, reliable insurance solutions. The AIA team can help you with an obligation-free quote for **Life Insurance**, **Income Protection** and **Health Insurance**.

You owe it to yourself to create the peace of mind that having the right protection in place can provide. Register your details at the below link and AIA will be in touch:

<https://www.aia.com.au/en/financial-wellbeing/get-in-touch/initial-chat?id=finsureweb>

And remember, please include my name as your broker, so they know I've referred you!

All the best,

<Insert Broker Name>

Option B (follow up after verbal positioning)

Hi <insert client first name>,

As mentioned when we spoke earlier, I suggest looking into a protection strategy. We partner with AIA Financial Wellbeing who offer a great service to help you with an obligation-free quote for **Life Insurance**, **Income Protection** and **Health Insurance**.

Register your details at the below link and AIA will be in touch:

<https://www.aia.com.au/en/financial-wellbeing/get-in-touch/initial-chat?id=finsureweb>

And remember, please include my name as your broker, so they know I've referred you!

All the best,

<Insert Broker Name>

SMS 2 | Settlement stage

Option A

Hi <insert client first name>,

Well done on completing settlement, that's a massive milestone.

As your broker, I have a duty of care and it'd be remiss of me not to remind you about looking at life insurance and income protection needs.

We partner with **AIA Financial Wellbeing** to offer affordable, reliable, and straightforward solutions for **Life Insurance, Income Protection** and **Health Insurance**.

Whether you're considering insurance for the first time or looking to review your current policy, the AIA team can provide you with an obligation-free quote or comparison. Just complete your details using this link and they'll be in touch.

<https://www.aia.com.au/en/financial-wellbeing/get-in-touch/initial-chat?id=finsureweb>

And remember, please include my name as your broker so they know I've referred you!

All the best,

<Insert Broker Name>

Option B (follow up after verbal positioning)

Hi <insert client first name>,

As mentioned when we spoke earlier, now that you've completed settlement and have a bit more headspace, I suggest looking into a protection strategy. We partner with AIA Financial Wellbeing who offer a great service to help you with an obligation-free quote for **Life Insurance, Income Protection** and **Health Insurance**.

Register your details at the below link and AIA will be in touch:

<https://www.aia.com.au/en/financial-wellbeing/get-in-touch/initial-chat?id=finsureweb>

And remember, please include my name as your broker so they know I've referred you!

All the best,

<Insert Broker Name>

SMS 3 | Health Only

Option A

Hi <insert client first name>,

Hope you're well. As your broker, I wanted to make sure you're all set for health insurance.

We partner with **AIA Financial Wellbeing** who are experts in personal insurance solutions. The AIA team can provide you with an obligation-free quote on **AIA Health Insurance** or comparison with your current policy. What have you got to lose? Just provide your contact details via the link and AIA will be in touch.

<https://www.aia.com.au/en/financial-wellbeing/get-in-touch/initial-chat?id=finsureweb>

And remember, please include my name as your broker so they know I've referred you!

All the best,

<Insert Broker Name>

Option B (follow up after verbal positioning)

Hi <insert client first name>,

Great to chat earlier. If you're interested in checking out **AIA Health Insurance**, here's a link to register your details:

<https://www.aia.com.au/en/financial-wellbeing/get-in-touch/initial-chat?id=finsureweb>

They can help you with an obligation-free quote or comparison to your current policy, so it's worth doing. And remember, please include my name as your broker so they know I've referred you!

All the best,

<Insert Broker Name>