

Knowledge	Skills	Responsibility and autonomy (Competences)
<p>European Insurance Intermediary EII (eficert)</p>	<ul style="list-style-type: none"> ▪ Guide the private (and small business; not industrial) customer through the sales conversation autonomously and systematically ▪ Explain to the customer their own professional background and situation (registration, company/companies represented ect.); explain the types of services they offer ▪ Do a needs analysis <ul style="list-style-type: none"> ▪ Collect relevant information ▪ Identify the needs and wishes of the customer ▪ Identify the risks to be covered ▪ Find a solution <ul style="list-style-type: none"> ▪ Compare the insurance needs and wishes of the customer and the eventual existing coverage ▪ Develop possible solutions in order to fill the identified gap ▪ Identify the most valuable solutions for the customer ▪ Propose solutions to the customer and explain consequences <ul style="list-style-type: none"> ▪ Show the (possible) gap to the customer ▪ Discuss possible solutions with the customer ▪ Point out the necessary coverage and compare with economic possibilities of the customer ▪ Agree with customer on the solution to be followed ▪ Offer appropriate product/s and explain correctly the insurance conditions ▪ Ensure that the customer understands the contract/s offered ▪ Get contract signed or make appointments for further steps to be taken 	<p>The general competence of the European Insurance Intermediary EII (eficert) is to give advice and create solutions by means of standardised products for personal-, property- and liabilities insurances, life insurances, pensions, legal and tax aspects, claims handling such as customer protection regulations on a needs analysis.</p>

Insurance Intermediary (EII) (SQF 3)

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	<ul style="list-style-type: none">▪ Make a documentation of the conversation▪ Follow up the contract<ul style="list-style-type: none">▪ Review contracts and conduct measures to manage portfolios and maintain contracts▪ Assist customer in case of claim (advice concerning claims process)	