

BSP™ TESTIMONIALS

“Accountants routinely audit and review the financial affairs of their clients and comment on the application of accepted accounting standards. The rigors of standards are seldom applied when brokering insurance. The Broker Shield Program audits existing standards within the brokerage, creates a priority to improve standards and forces documentation.”

Pearson-Dunn Insurance & Financial Services Inc.

“The BSP Workbook was incredibly useful and pinpointed key items that require attention within the brokerage”.

Renfrew Insurance Ltd. (Calgary)

“A good awakening – we thought we had pretty much dotted all our “i’s” but the BSP exercise was definitely worthwhile as we came across various areas where we need to make revisions. There were some areas that we do not have a procedure in place but they were few, which was encouraging.”

Sinclair Cockburn Financial Group

“The Broker Shield Workbook brought to the forefront what we need to improve. It was worth doing – we know we do things well but we want to do things even better.”

Dalton Timmis Insurance Group

“Glad we completed the Workbook – at first it seemed overwhelming but once started it went quickly and not intimidating at all. It certainly brought about a few questions.”

Gougeon Insurance

“Glad we completed the Broker Shield Workbook. We do audits, have procedures, etc. but just having the checklist brings up things you never thought of – really beneficial.”

Stevenson & Hunt Insurance Brokers Limited

“Completing the BSP Workbook has provided a good training tool for new hires and a good refresher tool for the experienced staff”

Algoma Insurance Brokers Limited