



# GREENKITE PROTECT

*Independent compliance assurance for  
insurance intermediaries*



GreenKite Protect provides your firm a tailored solution to ensure you are regulatory compliant. More than a service, it's a strategic partnership between us and your firm with seamless access to an AI-powered platform.

Our expert-led service remains front and centre—supplemented by intelligent technology that provides clients with live, searchable policy libraries, automated updates, and real-time insights. It's a smarter, more responsive compliance experience, combining trusted human judgment with the efficiency and consistency of AI support

Our retainer is tailored to meet the needs of your business. We can ensure your confidence, security and peace of mind. Our strength lies in personalisation, moving beyond a one-size-fits-all approach.

GreenKite Protect adapts to your unique needs, evolving with your business journey.

## YOUR COMPLIANCE SOLUTION

- **Expertise:** Access to in-depth knowledge - minimising any non-compliance risk
- **Fit for purpose:** Pragmatic and proportionate solutions which meet your requirements
- **Cost-effective:** An economical alternative to an in-house compliance team
- **Scalable:** Adaptable to the growing needs of your business
- **Flexible and customised:** Tailored support allowing you to concentrate on your core business

## KEY COMPONENTS

### Business health check

On the commencement of our engagement, we will undertake a basic review of your firm's regulatory compliance.

This process highlights potential gaps and improvements and frames our priorities to ensure you remain compliant.

The areas of improvement identified will be addressed whilst providing on-going BAU support and during the term of our retainer we will include a full review of your policies and procedures.

Provided by a committed compliance manager, supported by our extensive compliance and assurance team.

### Access to Ever Comply

A wide range of compliance templates. Simple, AI-powered search with Ask EVA – your virtual compliance assistant.

### Dedicated compliance manager

Receive up to 72 hours a year of dedicated compliance support, regulatory guidance, oversight and reporting.

Our appointed Compliance manager will also have access to our wider team of regulatory experts to provide any specialist advice as required to the firm.

### Horizon Scanning & E-alerts

Email alerts highlighting major industry updates, including significant fines and policy statement releases.

**Quarterly meeting** to plan time allocation and a monthly review of deliverables

**All this for just £22,000 per annum\***

\*Excludes VAT



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## WHY CHOOSE GREENKITE?

We are of the market, for the market – our multidisciplinary team of insurance experts offer the benefit of their extensive experience in all aspects of delegated authority, compliance and assurance.

Access deep and broad technical expertise, directed by informed strategic advice and delivered with current market best practice in mind. In addition to an extensive library of templates and reports, we can provide a tailored blend of seasoned expertise through an engagement model designed for your specific needs.

Our commitment to truly collaborative consultancy and dedication to excellent client service provides clients with a long term, trusted partner on whom they can rely, to help grow their business and avoid potential pitfalls.

## OUR APPROACH

Accountability matters – we believe in the importance of having a single, senior, dedicated point of contact for every client who is responsible for the overall success of the engagement. Throughout each client relationship, we continually review and reassess resources to ensure we are deploying the appropriate multidisciplinary team that will deliver real value for every client.

Unlike competitors, we do not flood projects with junior technicians, overseen by managers who are often one step removed. We work closely with each client to understand their unique requirements, then strategically apply appropriate technical expertise in the appropriate areas.

This approach delivers actionable, cost-effective solutions to our clients and material improvements to their bottom line.

## WE ARE GREENKITE

GreenKite is an award-winning, B Corp-certified, independent professional services consultancy, operating in the UK insurance market. We deliver practical, sustainable solutions that efficiently support internal change while ensuring future resilience and regulatory compliance.

Our flexible solutions are built around three core pillars and underpinned by our team's extensive market expertise and commitment to meaningful collaboration to ensure the best possible client outcome.



## HOW CAN WE COLLABORATE?

Talk to us about how we can address your challenges.

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