

nb@kngadvisors.co.uk

De: Hansard Onboarding <onboarding@hansard.com>
Enviado el: 05 August 2024 03:20
Para: nb@kngadvisors.co.uk
CC: n.emberson@kngadvisors.co.uk; 'Juan Pablo Guglielmi'; 'Juan Pablo Guglielmi'; Mark Winstanley
Asunto: Re: [External] RE: New Business - MARIA FERNANDA DEICHLER VEGA Policy: 800567P

Dear Miguel,

I can confirm collection was successful.

Kind regards,

Aoife Kennish

From: Hansard Onboarding <onboarding@hansard.com>
Sent: 02 August 2024 11:32
To: nb@kngadvisors.co.uk <nb@kngadvisors.co.uk>
Cc: n.emberson@kngadvisors.co.uk <n.emberson@kngadvisors.co.uk>; 'Juan Pablo Guglielmi' <juanpablo@suncapital.cl>; 'Juan Pablo Guglielmi' <guglielmiesposito@gmail.com>
Subject: Re: [External] RE: New Business - MARIA FERNANDA DEICHLER VEGA Policy: 800567P

Dear Miguel

Thank you for your email.

Please note that the policy has now been set to active and the credit card collection will be attempted overnight.

Please note we will advise you if the collection has been successful on Monday.

Kind Regards
Hannah Boorman

From: nb@kngadvisors.co.uk <nb@kngadvisors.co.uk>
Sent: 01 August 2024 23:25
To: Hansard Onboarding <onboarding@hansard.com>
Cc: n.emberson@kngadvisors.co.uk <n.emberson@kngadvisors.co.uk>; 'Juan Pablo Guglielmi' <juanpablo@suncapital.cl>; 'Juan Pablo Guglielmi' <guglielmiesposito@gmail.com>
Subject: [External] RE: New Business - MARIA FERNANDA DEICHLER VEGA Policy: 800567P

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Dear Team,

Do you have an update about this requirement?

I look forward to hearing from you.

Best wishes.



Miguel Romero

Business Support Manager

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From: nb@kngadvisors.co.uk <nb@kngadvisors.co.uk>

Sent: Tuesday, July 30, 2024 12:00 PM

To: 'Hansard Onboarding' <onboarding@hansard.com>

Cc: n.emberson@kngadvisors.co.uk; 'Juan Pablo Guglielmi' <juanpablo@suncapital.cl>; 'Juan Pablo Guglielmi' <guglielmiesposito@gmail.com>

Subject: New Business - MARIA FERNANDA DEICHLER VEGA Policy: 800567P

Dear Team,

We have uploaded the new business documents for the client MARIA FERNANDA DEICHLER VEGA Policy: 800567P Plan: VANTAGE PLATINUM

Note: Please set the initial premium charge/collection to be collected automatically upon activation of the plan/policy. Customer agrees, TDC details uploaded to the portal and funds are available in the account.

We look forward to your comments and confirmation on the above please.

Kind regards



Miguel Romero

Business Support Manager

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From: Hansard Onboarding <onboarding@hansard.com>
Sent: Friday, July 26, 2024 4:56 AM
To: nb@kngadvisors.co.uk
Subject: Maria Fernanda Deichler Vega - New Business - Policy number not generated

Contract - 800567P

Thank you for you providing the application for the above client.

Please note that in order to proceed we will require the following:

- Signed client signature card as the one provided is not signed by the client
- We note that there is a mandated agent fee for the policy however we will require a signed mandated instruction in order to apply this to the policy- please note this will not hold up issue.
- Credit card collection date to be 2nd August 2024

Kind Regards
Hannah Boorman

From: nb@kngadvisors.co.uk <nb@kngadvisors.co.uk>
Sent: 24 July 2024 09:43
To: Hansard Onboarding <onboarding@hansard.com>
Subject: [External] Query - Maria Fernanda Deichler Vega - New Business - Policy number not generated

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Dear Team,

I am asking for your help with this requirement, an advisor uploaded a New Business in the Hansard portal in order to generate the application documents and policy number, but when uploading the data and completing the process, the system displayed this message without generating the new policy number. It should be mentioned that this new business is from an existing HANSARD client, Maria Fernanda Deichler Vega – HW 800267U.



HANSARD
WORLDWIDE

Página

Su solicitud

Puede supervisar el estado en el panel

The advisor went to the main panel and there is no more data available on the uploaded business, can you make the revisions and let us know how the advisor can get the policy number from the newly uploaded application to continue the signing process with the client please?

I look forward to hearing from you.

Regards,



Miguel Romero

Business Support Manager

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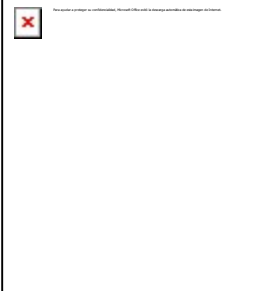
Onboarding Team

Hansard Global

Email: onboarding@hansard.com

Web: www.hansard.com

During UK office hours (08:30 to 17:00 UK time) you can also reach us on + 44 1624 688255



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