

Insurance Proposal Writer

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Writes a client-facing insurance proposal — a needs summary, recommended cover (product, sum insured, premium and why), key features and exclusions, and next steps. Use this to present a clear recommendation the client can understand. For the underlying needs assessment first use the Insurance Advisory Framework.

Purpose of this tool & output

Clear proposals clients understand

How the output is used

Use the writer to create clear insurance proposals clients understand and can act on.

Important cautions

AI-generated proposal; ensure needs-based, disclose material terms, and read policy wordings.

Companion documents

- Insurance Advisory Framework
- Policy Comparison Helper
- Claim Assistance Guide
- IRDAI Distribution Compliance
- Policy Renewal Management
- POSP / Agent Setup Guide

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.