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Coverage Recommendation Report

Insurance

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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

Produces a tailored coverage recommendation report for a client — prioritised covers with limits and rationale, phasing and an indicative budget. Use it to advise a client on what to buy. To turn it into a client-facing quote comparison, use the Insurance Proposal Generator.

Purpose of this tool & output

Produce a tailored cover proposal

How the output is used

Use the report to produce a tailored cover proposal for a client, matched to their risk and budget.

Who should vet it

An insurance broker, to confirm the recommendation and quote it.

Important cautions

AI-generated recommendation; obtain formal quotes; suitability-based advice.

Companion documents

- Client Insurance Review Report
- Cross-Sell Opportunity Finder
- Risk Profile Questionnaire Builder
- Insurance Proposal Generator
- Client Renewal Advisory

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.