

Insurance Proposal Generator

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

Generates a professional client-facing insurance proposal — needs, recommended cover, an options comparison across insurers and next steps. Use it to present quotes to a client. To first decide the recommended program, use the Coverage Recommendation Report.

Purpose of this tool & output

Create a client-facing proposal

How the output is used

Use the generator to create a clear client-facing insurance proposal with covers, limits and premium.

Important cautions

AI-generated proposal; confirm quotes and wordings with insurers.

Companion documents

- Client Insurance Review Report
- Cross-Sell Opportunity Finder
- Risk Profile Questionnaire Builder
- Coverage Recommendation Report
- 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.