

Statement for Advisers & Partners

OLPC Good Practice Guide



This guide has been developed to help our partners to apply a compliant approach to accessing and processing data on OLPC/ Agent Hub. By following the 3 step guidance below, you are ensuring absolute confidentiality of your customer's data.

| Guidance | Do's | Don't |
|---------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| One user = one user ID | Every individual accessing our systems should have their own login ID. Advisers should be automatically registered. Logins for support staff can be requested at https://www.legalandgeneral.com/adviser/protection/doing-business-with-us/getting-started/ . Contact 0370 050 0274 for further support. | Under no circumstances should a user ID and password be shared amongst colleagues |
| Leavers' credentials need to be updated within 24 hours of them leaving | When staff leave, the Directly Authorised agency or principal in the case of Appointed Representatives is responsible for advising L&G via agency.admin@landg.com and advisercentre@landg.com or 0370 050 0274 the day they leave and no longer than 24 hours of them leaving. If there are pipeline cases linked to that user, we can grant the access to another agent currently employed by the firm who already has a valid login allowing ongoing pipeline management. | Under no circumstances should a user credential be 'active' when the user for whom it was created is no longer in your employment. We have a mechanism whereby in-flight applications and pipeline business can be transferred to another agent seamlessly. |
| OLPC super user accounts are for senior members of the business who need wider access | An OLPC super user account can be created on a case by case basis to enable a small number of senior staff to access multiple agent records. This can be requested by the adviser or a director in the company but you will be asked why this access is required before we can grant access. All requests to be sent to advisercentre@landg.com or by calling 0370 050 0274. Call charges will vary. We may record and monitor calls for training purposes | Under no circumstances should OLPC super user IDs be shared amongst agents as this would result in an inability to trace activity by agent on client accounts. If there are accounts for which multiple agents require access, please contact 0370 050 0274 to activate this functionality for your firm. |

We have had feedback from firms about the way in which our commission statements are generated and the unintended consequence of excessive emails. To this end we are in the process of improving our operations to ease this reporting for all of our partners. Please bear with us whilst we explore the introduction to these changes. We aspire to continuously improve the applications and systems we provide our intermediaries, to ensure compliance with GDPR which in turns maintains security of customer data; and welcome your input. So, if you or your teams have any further feedback on OLPC, please contact your legal and general business development manager.

