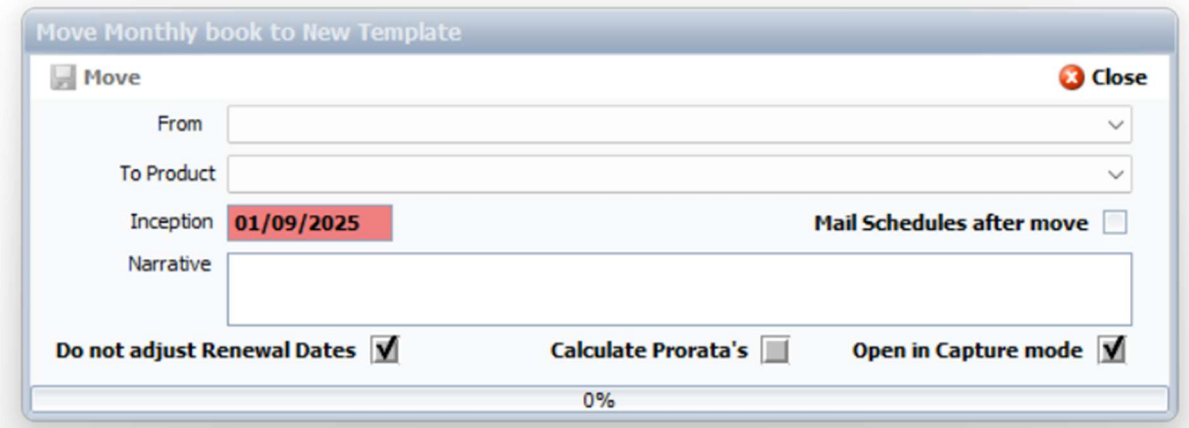


Brokers will need to do the following:

- Brokers will need to create a new creditor called “Hollard (ex Lombard)”, and once created, Integrity will copy the Lombard products to the new creditor.
- Brokers would also need to resolve/finalise any parked policies and quotes before the move as only data from active monthly policies will be moved.
- The Integrity system is able to move active policies, however annual policies will need to be addressed manually by the Brokers. Please note the move will cancel the current Lombard monthly policy.
- Once the new products are created by Integrity, brokers can then proceed with the book move found under Tools – Move Book, and select the product that they want to move to and from as well as the effective date:



The screenshot shows a dialog box titled "Move Monthly book to New Template". It contains the following fields and options:

- Move** (tab icon) and **Close** (button with red X icon)
- From**: A dropdown menu.
- To Product**: A dropdown menu.
- Inception**: A text field containing "01/09/2025".
- Mail Schedules after move**: A checkbox that is currently unchecked.
- Narrative**: A large text area.
- Do not adjust Renewal Dates**: A checked checkbox.
- Calculate Prorata's**: An unchecked checkbox.
- Open in Capture mode**: A checked checkbox.
- Progress bar at the bottom showing 0%.

- Open claims will remain on the current Lombard policy to run off.
- Premium rollup to a single debit will depend on the Broker settings.