

## SBR Referral tool

Case: New Document

You have 29:38 minutes to save OR submit your work.

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### Referral Details

Reference Number: Number will be calculated once the document is saved.

\*Date of Submission: 12 Nov 2019

\*Submitted By: [User Icon]

Legal Entity: [Text Box]

Other SR Employees Involved: [User Icon]

Status: Draft

\*Due Date: [Date Picker]

Project: [Text Box]

### Transaction Details

New Client for this Line of Business?: ☒ Yes ☐ No

\*Insured: [Text Box]

\*Main Line of Business: [Dropdown]

\*Country: [Dropdown]

Continent: [Text Box]

Expected Premium Income: [Text Box]

Client Relationship Additional Comment: [Text Box]

### Referral Reasons

\*Sustainability Risk Policy: [Dropdown]

Referral Description: [Rich Text Editor]

Please attach UW documents, EIAs, RES reports for your transactions. Keep file size below 65MB.

Referral Documents: [File Upload Area] Browse...

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Do not upload attachments containing sensitive personal data, such as health/medical information (see definition in [Group Data Protection Policy](#)). If you have a legitimate business need to share such information, contact [Data\\_Protection@swissre.com](mailto:Data_Protection@swissre.com)

Make sure to mention all the relevant information in the 'Referral description' tab and attach all the relevant documents in the "Referral Documents" tab at the bottom.

Case: New Document

You have 29:50 minutes to save OR submit your work.

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### Referral Details

Reference Number: Number will be calculated once the document is saved.

\*Date of Submission: 23 Apr 2019

\*Submitted By: [User Icon]

Legal Entity: [Text Box]

Other SR Employees Involved: [User Icon]

Status: Draft

\*Due Date: [Date Picker]

Project: [Text Box]

### Transaction Details

New Client for this Line of Business?: ☒ Yes ☐ No

\*Insured: [Text Box]

\*Main Line of Business: [Dropdown]

\*Country: [Dropdown]

Continent: [Text Box]

Expected Premium Income: [Text Box]

Client Relationship Additional Comment: [Text Box]

### Referral Reasons

\*Sustainability Risk Policy: [Dropdown]

Referral Description: [Rich Text Editor]

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Referral Documents: [File Upload Area] Browse...

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The Sustainability Risk team will then review your transaction and revert to you within 48 hours with a binding decision to either proceed, proceed with conditions, or abstain from your transaction.