

JOHN LAMB

JOHN LAMB PARTNERSHIP LIMITED



Testimonial for Miss Svenja Keller Paraplanner of the Year 2009 Competition

Svenja works as a paraplanner for John Lamb Partnership Limited and provides invaluable support for a number of my clients, allowing me more time to focus on the strategic work for and relationship management with those clients and releasing me so that I am able to spend more time on marketing and client acquisition.

Svenja is an outstanding paraplanner – she has a very strong eye for detail both in terms of checking information sent to us by product providers and also in all her written work for the clients. Svenja is a very calm person, who seemingly is never phased by dealing with the vagaries of the product providers, nor the most demanding clients and is unfailingly polite and charming to everyone including her colleagues. All this comes from the fact that she treats everyone with respect. In addition Svenja is very modest – she has now received distinction in both the J papers that she has taken, and seems to underestimate her own undoubted technical expertise.

Svenja is incredibly hardworking – she is frequently one of the last to leave the office as she always wants to ensure that she has completed the tasks for the day and never wants to let a client down if work has been promised by a given date.

In short a paragon, and also a very warm and friendly person.

Svenja's work is always of the highest standard and she always goes the "extra mile" for clients. We had an enquiry recently for some life insurance for a client from a referring introducer with significant residency issues as the client was going to the US within three days for 12 months. Svenja managed to obtain quotes, agree in principle with underwriters that they would consider the application, get application forms completed so that I could deal with their signature, submit the applications on line, get medicals arranged and all within three days. While it might seem a mundane issue, i.e. the placing of life insurance, this was for cover of £3.6m and Svenja demonstrated a real understanding of how the insurance and reinsurance markets worked and understood the need to get everyone in the chain, from client through to doctor to insurer and re-insurer to work together to achieve an outstanding result in a time frame that I thought had become impossible to achieve.

I think that Svenja is an asset to any firm and to the industry and an example of the type of high calibre person that we all want to employ as paraplanners and I think she truly deserves the title of Paraplanner of the Year

A handwritten signature in black ink, appearing to read "Paula Steele".

Paula Steele
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