



PROTECT CLIENT DATA, STAY COMPLIANT, AND REDUCE EVERYDAY RISK

Practical, ongoing risk protection tailored for insurance brokers.

Why it matters?

Insurance brokers are under growing pressure, not just to protect client data but to demonstrate that risks are being actively managed.

Many believe their IT provider or antivirus software covers them, but compliance isn't just about having the right tools. It's about awareness, habits, and showing that risks are being addressed consistently.

And most incidents don't involve advanced hacking. More often, it's a fake invoice, a misdirected email, or an unprotected device that causes reputational damage and leaves firms exposed to regulatory scrutiny.

Sanctuary helps reduce those risks while supporting compliance clearly and without slowing down your business.

"We thought we had things covered – until a supplier breach exposed client information we never expected to be at risk."

What you gain

- **Protection against phishing, impersonation, and payment fraud**
- **Better visibility** across devices, behaviours, and daily risks
- **Improved staff awareness** through structured, monthly training
- **Demonstrable compliance** effort through documented training and oversight
- **Clear, informed guidance** when something doesn't feel right

How it works

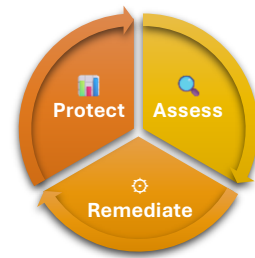
Sanctuary is designed to work alongside your existing processes and providers – offering practical, structured protection that's easy to implement. It includes:

- **A plain-language risk-check** to identify where exposure exists
- **Monthly computer-based training** on real-world threats like phishing, payment redirection, and secure remote work
- **Ongoing monitoring of laptops and mobiles** for outdated software, poor configuration, and missing protections
- **Regular tailored threat intelligence insights** and seasonal updates
- **Premium tiers** include formal risk assessments, policy templates, and executive-level risk reviews

This isn't just advice. It's a practical, structured approach

Our structured approach makes it easy to stay protected without complexity:

1. **Assess** – Spot risk through a self-assessment or initial managed review
2. **Remediate** – Focus on the fixes quickly that matter most
3. **Protect** – Stay ahead of new threats with monthly updates, training, and monitoring



You can concentrate on your clients, knowing someone's keeping watch in the background and ready to step in when needed.

Who is Sanctuary Advisory Services?

Sanctuary provides independent, business-first risk protection for brokers, advisors, and growing firms.

Founded by a global risk and advisory professional, the service brings clear, structured oversight to help you reduce disruption, avoid mistakes, and stay ahead of emerging risks – without the jargon or complexity.

"It wasn't about buying more tech – it was about making sure the right things were in place, and actually doing their job."

Let's keep it simple

If you're relying on a few tools and good habits – but haven't looked at risk in a while – this is a simple place to start.

Let's talk.

Visit: www.sanctuaryadvisory.com

Email: info@sanctuaryadvisory.com

Book a Call: [Schedule a quick intro call](#)

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