Third-party portfolio — relationships and services

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Prévéance Courtage — fictional wholesale broker in personal insurance and retirement · fictional document

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> **Fictional document**, produced for the demonstration. The values below are the ones the engine actually read from the case: they recompute, they are not transcribed.

What the register links

Business object	What it carries
mandat de délégation de gestion	owner, contract, service supported, review date
convention de courtage	owner, contract, service supported, review date
registre des délégataires	owner, contract, service supported, review date

Business object	What it carries
annexe de traitement des données de santé	owner, contract, service supported, review date

The segment rules, applied as written

Rule
Un délégataire de gestion traite des données de santé pour le compte du courtier : l'annexe de traitement est une pièce du dossier, pas une formalité.
Un outil de gestion partagé entre plusieurs délégataires concentre le portefeuille entier : la panne n'est plus locale.
Une attestation de sécurité produite par le grossiste ne couvre pas le délégataire qu'il emploie.

Counting unit for this file: **contrats en portefeuille**.

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