



Third-party portfolio — relationships and services

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

Fictional document — demonstration example

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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**.

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.