



# Support your customers with Lifetime Planning beyond their Lifetime Mortgage



# BENEFITS FOR YOUR CLIENTS

## Keylu can help your customers take a proactive approach to lifetime planning

It enables them to securely organise and store their important documents, memories and moments in one safe place, for easy access and peace of mind.

An up to date record of everything important, and the personal memories they want to keep safe, revisit and share with their loved ones.

- ✔ Savings accounts
- ✔ Pensions
- ✔ Life Insurance
- ✔ Wills
- ✔ Power of Attorney
- ✔ Photos and videos
- ✔ Recorded messages for family and friends
- ✔ Detailed gifts and bequests
- ✔ Funeral plans

All this is kept safe in a secure, encrypted format, and can be easily accessed at the click of a button, by the right people at the right time.



# BENEFITS FOR YOU

## Keylu gives your customers something extra, improving your service levels

It adds real value for your customers and their loved ones, helping you to stand out above your competitors.

You have the option to share it with your customers in one of two ways:

1

### **It can elevate your brand by giving something back, offering your customers access to a Keylu account as part of your service**

Increasing numbers of advisers have been asking what they can do from a charitable perspective to make their brand more socially responsible.

More and more customers are looking for this when deciding which brand to choose.

This is something that you can offer, supporting your customers with lifetime planning that goes beyond just their lifetime mortgage, for just £25 per account per annum.

2

### **It can create a new revenue opportunity for you, whilst helping your customers to keep their affairs in order**

Each time a customer signs up for an annual Keylu account, you can receive £5 for the referral.

Mutually beneficial, this can help to support both your business and your customer needs.

FOR YOU • FOR THEM • FOREVER



## Get in touch

We're proud to work closely with organisations who add real value to the communities they serve, and whose services closely align with our vision and values. Get in touch with a member of our team today to explore how we could work together and begin to make a real difference...

Our highly experienced and passionate team is on hand to support and answer any questions.

**Contact us to find out more,  
quoting reference code PR01:**

[hello@keylu.com](mailto:hello@keylu.com)

[www.keylu.com](http://www.keylu.com)

