

# Lifetime Mortgage Specialists

Here for all the market,  
all the time



## Lifetime mortgage specialists

Since 2013, we've supported financial advisers through offering a lifetime mortgage service designed to make your job easier and your clients happier. We understand the importance of providing clear communication, reliable support, and flexible solutions, allowing you to focus on delivering exceptional outcomes.

“Whether you are a small, medium or large advisory firm, we offer the same trusted services and resources to you all.”

Scott Burman, Head of Distribution



## Sales team support service

Your dedicated **Sales team support** is here to help you every step of the way, and who want what's best for your clients. By helping you complete application pre-checks and avoid common pitfalls, we save you and your clients valuable time.

### ✓ ID and verification

We'll help ensure you submit the correct documentation first time, avoiding unnecessary delays

### ✓ Electronic ID setup

We can guide you through setting up Electronic ID to make future applications even easier

### ✓ Flood zone checks

Unsure if a property is in a flood zone? We'll check and advise which of our plans are suitable

### ✓ Property criteria checks

We can help you assess properties against our lending criteria, including:

- Proximity to commercial premises
- Nearby pylons
- Ex-local authority housing

### ✓ Property conditions

With your help, we will flag any potential issues early, helping you avoid surprises later in the process

## Our commitment to you

We're here to support every adviser and customer in the equity release market, all the time, through offering a wealth of resources and support to help you thrive:

Easy access to the largest Intermediary Sales team in the market.



Product variety, available on the sourcing platform of your choice, all the time.



Pre-check service, assessing your client's property details before application submission.



Underwriting promise – a dedicated underwriter working on all your cases from start to finish.



Educational resources for you and your customers.



An extensive suite of free marketing templates.



Award-winning service to you and your customers.



A market-first customer online account management platform, MyPure.



## A trusted lender

We're well known for our outstanding service levels, and pride ourselves on being a trusted lender. With over 30 industry awards and an 'Excellent' status on Trustpilot, we're committed to delivering customer satisfaction.

### Mr Faulks ★★★★★ Trustpilot

"Excellent service! The process was straight forward from start to finish. We were kept informed of progress and the staff were efficient and friendly. The whole process was a lot quicker than we anticipated."

### Mrs Bamwell ★★★★★ Trustpilot

"We are so pleased with the way our Lifetime Mortgage was arranged. The help, advice, support and outcome have been invaluable. Thank you so much."



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