



Working together to unlock property wealth

Helping your later life clients realise their financial potential

The world of retirement financial planning has evolved. Consumers have never had so much choice in the timing, phasing and manner of their retirement. But with so many people reaching this point in their lives 'asset rich/cash poor', more and more are starting to realise that the cash tied up in their biggest asset – their home – could somehow be the key to funding this new 'life after work'.

That's where we come in

We know that advisers and intermediaries from all sectors of financial services (and beyond) are starting to have these conversations, and this is just the tip of the iceberg. There are almost 25 million people aged 50+ in the UK and if only 10% of them want advice on later life lending options to tap into housing wealth, that's at least 2 million people looking for help.

We can help - them and you

We're experts in this. It's in our DNA. We've been offering equity release advice and services for more than 20 years. Key is one of the biggest and most respected brands in this market and Key Partnerships is your referral gateway to this award-winning, market-leading advice platform.

Our referral proposition is so simple and safe. We never forget whose client this is, so we provide a process that puts you in control and your client at ease. A name, an address and a contact number are all we need.

We do the rest

You don't need any qualifications or experience in this market. You don't have to worry about compliance and regulation. That's our job, and we're very good at it. 13,000+ 5-star TrustPilot reviews is a testament to that, and why more than 8,000 introducers have already registered with us.

In return, we will pay you a valuable additional income (in 2018, this was an average of £1,483 for every completed case). We will also help your business to grow by sharing our unique market insights, research and data with you and provide you with access to a cutting-edge online portal that puts this information at your fingertips with real-time tracking of your referral cases.

Because if you grow, so do we. And if you benefit, so do your clients. Together, we can help your later life clients unlock property wealth to help realise their financial potential.



Jason Ruse,
Head of Key Partnerships

The Key Partnerships Proposition

Our Partnership Promises	<div style="text-align: center;">1</div> Treat your clients fairly	<div style="text-align: center;">2</div> Go the extra mile	<div style="text-align: center;">3</div> Respect you and your business
What we mean by this	<p>We always have your client's best interests at heart.</p> <p>We listen to their needs and, by staying fully abreast of the rapidly changing equity release and later life lending market, we deliver a premier level of specialist advice designed to help them realise their financial potential.</p> <p>And if equity release is not right for them, we'll tell them so.</p>	<p>We make your life as easy as possible.</p> <p>We keep you informed throughout the process and as involved as you want to be. We share our expertise with professionalism: we are open and approachable. We make referring easy and hassle-free, ensuring you get paid promptly on every completed case.</p> <p>We go further, so you don't have to.</p>	<p>We never forget whose client this is. We build trust with introducers because we value every referral you give us and we will never cross-sell or up-sell to your clients. We view our business relationship as a two-way street, not simply a referral transaction.</p> <p>Because if you grow, so do we.</p>
What this looks/feels like	We deliver great client outcomes	We make the process easy for you and your clients	We help you grow your business
How we deliver this	<p>We provide a specialist, whole-of-market advice service through a network of nationwide experts who have helped over one million people in later life decide whether or not equity release is right for them.</p> <p>Great client outcomes are in our DNA. It's why we have received over 13,000 5-star reviews on Trust Pilot and why more than 8,000 registered introducers have turned to us as the referral partner of choice for their business.</p> <p>We're one of the UK's most respected, recognised and trusted brands in the later life lending market with a heritage that stretches back 20 years and a trophy cabinet that bears testament to our on-going commitment to customer service.</p>	<p>Our simple referral process means you can start referring straightaway without any qualifications or industry experience. You don't have to worry about compliance or regulation. That's our job.</p> <p>It's so easy – a name, address and contact number is all we need. We take care of the rest and you can be involved as much or as little as you want to, with support on hand to help walk you and your client through the process, step by step.</p> <p>And for total peace of mind, our market-leading online portal allows you to track the progress of your cases online in real time, 24/7, keeping you up-to-date and fully aware of what's going on with every client.</p>	<p>We give you the ability to offer clients a complementary service that supports your core business areas AND earn a valuable income stream.</p> <p>In 2018, our average payment to referral partners was £1,483 for each completed case.</p> <p>And because many of our introducers want to expand this area of their business, we also offer you exclusive access to our unique market insights and education through online tools and support.</p> <p>But this isn't done in a vacuum. Through regular interaction and research with our introducers, we produce and share content designed to meet the varied business needs of our introducer customers.</p>
Measures of success	<ul style="list-style-type: none"> • 13,000+ 5-star TrustPilot reviews • £119m in loans in 2018 (£1 in every £30 lent by the entire market was referred through Key Partnerships) • Nationwide network of 100+ specialist advisers • A trusted, recognised brand (national TV advertising) • 50+ industry awards spanning two decades 	<ul style="list-style-type: none"> • Market-leading online portal • Real-time referral process – track your referrals 24/7/365 • Experienced, knowledgeable support staff available to answer your queries, book appointments etc • Wide range of B2B and B2B2C collateral to help explain the process 	<ul style="list-style-type: none"> • CII-accredited webinar programme • Online marketing hub and unique adviser tools • Bespoke research and unique market insights (e.g. Market Monitor) • Competitive referral payment structure • Expert Business Development team available to help grow your practice

Find out more



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