

Equity release referral  
opportunities



**Help your clients see  
their biggest asset as part  
of their retirement plan**



This is intended for intermediaries only and has not been approved for customer use.

## Could your clients afford a better quality retirement?

Following decades of property price increases, some of your clients aged 55 and over will be sitting on a large amount of property wealth. However, it won't be uncommon for many of them to be asset-rich but be relatively cash and pension poor.

If your client is living a more frugal retirement than they intended whilst having lots of money tied up in their home, equity release can be a great way to help them finance a better lifestyle without the disruption of selling up and downsizing. Find out how Key Partnerships can help.

### Your client is living a cost-conscious retirement

They're worried they'll run out of money, so they're constantly cutting corners and stopping themselves from doing many of the things they'd wanted to do in retirement. They are torn by wanting to live life to the full but not having the money to do so.

You're aware they have significant equity in their home, so you suggest equity release as an option that they should at least consider.

### An alternative way to fund their retirement

You explain the concept of equity release and they sound interested to explore it, so you suggest them having a no obligation initial chat with a qualified equity release adviser to see if it's something appropriate for them.



### A solution that works for everyone

After passing on your clients contact details and following an appointment and recommendation from an expert adviser:



Your client is delighted that they've found a way to be able to enjoy more financial freedom in retirement whilst being able to stay in the home they love. **They release 35% of the equity from their home with a lifetime mortgage.\***

#### Different ways people choose to spend the equity released:



Fund a more active retirement



Gift money to their children and grandchildren



Pay for home improvements



Buy a second or holiday home



Pay for holidays



**You get a nice referrer payment** for the completed case\*\* and a very appreciative client.

\* Client eligibility and the amount they can release depends on personal circumstances

\*\* Our average referral payment for completed cases in 2019 was £1,536



## Sound good to you?

It's so simple: you refer, we chat, we advise, you earn.  
Give us a call or register online.



[www.keypartnerships.co.uk](http://www.keypartnerships.co.uk)



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