



# How to use fastpath

Market-leading  
technology to  
accelerate your  
business



fastpath is the first end-to-end digital application system in the equity release market. It has been built to allow quick and easy KFI creation, as well as fast application submissions, live case updates and twice-weekly commission payments.

Login

Your user name will be the email address you used to register.

User Name \*

Password \*

[Forgot password?](#)

Not yet registered? - Please click the button below to register.

## Let's get started

It's easy to register, you'll just need your personal details and company details, such as your FCA number. Once you have registered, you'll receive an email from our Adviser Support Team confirming your account is ready, and details on how to get in touch, should you need them.

Company type

Your registered firm number

\* Information is compulsory

[Terms & Conditions](#) | [Privacy](#) | [Cookie](#)

# Creating KFIs

Enter the illustration tab at the top of the page, from there you'll be required to enter basic information about your client, including their DOB, marital status and estimated value of the property, as well as some simple property questions.

Further in depth questions will be asked about both the client and property at the application stage, but this initial section allows the system to provide you an indicative figure and an accompanying illustration.



Home Products Literature **Illustration** Application Search User Profile Company Profile Logout

Submission Details  
Applicant 1 Details  
Product Selection  
Fees and Features  
Illustration Summary

Please note that acceptance is subject to our underwriting criteria. Please click here for more information or contact our Sales Support team on 03454 500151.

### Illustration – Submission Details

#### Privacy Notice

You must inform your customer that their data will be used to assess their eligibility for a Lifetime Mortgage and will support their application and administration of the mortgage. Please tick to confirm you have provided the customer with our full [privacy notice](#)

Confirm, I have read the above statement and agree to proceed.

#### Submission route details

Advice given and a recommendation made that the customer(s) apply for the lifetime mortgage product indicated (advised sale) \*

Advised  Non advised

Is the Application being submitted via a Mortgage Club? \*

YES NO

Mortgage Club \*

#### Medical Questionnaire

Do you wish to fill in a medical questionnaire? \*

YES NO

#### Plan details

# Application summary

Once the KFI is created, fastpath will create a application summary page where you will be able to access the KFI in future. This will also allow you to amend the KFI if you wish to make minor changes without creating a whole new case ID.

This is where you'll also find information on the case's progress and how you can submit the KFI to application page via the '**Click here to APPLY or AMEND KFI**' button.

You'll also find supporting documents here beyond the KFI, such as a blank application form for data capture. Please note that you are not required to fill out a paper application, this is non-essential as the application is all done digitally. However it can be used for face-to-face data capture.

Summary for Application 438200, Residential, Remortgage			
Applicant Name(s)	Raisbeck, Matthew	Property	pr2 3nt
		Estimated Valuation	£350,000
Initial Advance	£92,750		
Solicitor	-		
Product	Capital Choice Super Lite Lump Sum1 3.12%		

Illustrations - Click here to APPLY or AMEND KFI	
Capital Choice Super Lite Lump Sum1 3.12%	04/05/2020 13:52:14

# Application submission

Once you are happy to submit your case you will be taken through the application process. This is far more in depth than the KFI creation, and requires more details about the clients as individuals, their property and details about credit history.

Just click on the button that reads '**Click here to APPLY or AMEND KFI**' just above the KFI document section of the summary page.

Please note the specifics of how much the client wishes to borrow cannot be changed during application, but a request can be made once the application is submitted.

## What happens after?

Once the application is submitted several things will happen instantly; a valuation will automatically be instructed and a credit check will also run against the client, along with internal authentication processes which will confirm the clients address.

If any further information is required you will be contacted via email or telephone by our Underwriting Team. It is important to ensure the email address and other contact information you've provided is correct to ensure we can ask for relevant information to progress your case.

The screenshot displays a web application interface with a green navigation bar at the top containing the following menu items: Home, Products, Literature, Illustration, Application (highlighted), Application Search, User Profile, Company Profile, and Logout. Below the navigation bar, the main content area is divided into two sections. On the left is a vertical sidebar menu with the following items: Applicant: Case Reference: (highlighted), Intermediary Declaration (with a checkmark), Submission Route (with a checkmark), Applicant 1 Details (with a checkmark), Personal Details (with a checkmark), Applicant Other Details (with a checkmark), Address Details (highlighted), Commitments, Adverse Details, Household Expenditure, Property Details, Product Selection, and Product Fees. On the right is the 'Current address search - Applicant 1' form. This form includes a question 'Is the address a UK address? \*' with 'YES' and 'NO' radio buttons. Below this are input fields for 'Name or number' and 'Postcode \*'. A 'Find Address' button is positioned below these fields. Further down, there is a 'Residential Status \*' dropdown menu and a date range selector for 'From \*' (with a date field) and 'To \*' (with a date field set to '05/2020'). A red asterisk note at the bottom of the form states '\* Information is compulsory'.

# Keeping up-to-date

As well as email updates regarding your cases, we will also update details about any open cases within each client profile page. This will be outlined under the note section, you will be able to type notes directly to the Caseowner Team.



## Notes

19/06/2020 12:34 - Working Esurv portal - "please can you confirm if this is required as a MV was carried out 29th May" Advised it's not required as we have the val report for 29/05 [Kirsty.Davies]

17/06/2020 05:11 – New Case Please cross reference this case with the case it replaces of 000001 as the Valuation has already been carried out [PortalUsers/sadine4823@uwuefr.co.uk]

[Add Notes click here](#)

## Valuation Status Message

18/06/2020 09:46 – 18/06/2020: Quest valuation has been booked for the 21/06/2020 between 11:00-12:00 at address, 1 Sample Street, Fulwood, Preston, PR2 9ZH. [svc\_DPRScheduler]

17/06/2020 06:17 – 17/06/2020: Quest valuation has been placed on hold (Valuation Ref.1) – Other Address: 1 Sample Street, Fulwood, Preston, PR2 9ZH. [svc\_DPRScheduler]

# Navigating fastpath

Home

Products

Literature

Illustration

Application Search

User Profile

Company Profile

Logout

## Home

This page has a brief introduction on what exactly you can do on fastpath, and any servicing updates can be found under servicing messages. If we're due to have any maintenance or are experiencing any issues regarding the portal, for example, an update will be posted here.

You will also find recent KFIs and cases here too. These are organised by most recent. To keep this list as clear as possible for you, we advise that you take advantage of the 'amend KFI' option whenever you require a second KFI for the same client(s). This can be found within the summary for application page, accessed via clicking the client's case reference number.

## Products and literature

These buttons will guide you back to our website where you will find everything you need to know about the vast and diverse array of plans we offer, including current rates, LTVs, features, lending criteria and our plan guides.

## Illustration

This is where you can start creating KFIs for your clients. All you have to do is follow the steps and fill in the appropriate client information. Once done, the system will show you the products available to your client and allow you specify amounts, fees and other details.

## Application search

Once a case falls off your recent cases, it isn't gone forever. It can be found via our application search function which allows you to find old KFIs, declined cases, completed cases and anything in between. It's simple to use, just provide one of the following details and we'll search your applicant bank: client surname, postcode or case reference.

## User profile

Here you'll be able to manage your account; this includes changing your password, address details and contact details. This is also where you can change your submission route list

(which allows you to personalise which clubs you want to assign each case to). You are able to register with multiple clubs, but you can only submit one case to one club, which is chosen at KFI stage.

## Company profile

Here you'll find information about the company you're registered with, including the company name, FCA number and the current company address. You can contact us via **info@more2life.co.uk** if any of this information needs updating, such as a change of address.

## Logout

You can click this button to leave the portal and logout.

# Technology designed to accelerate your success



For more information

 **03454 500 151**

 **info@more2life.co.uk**

 **more2life.co.uk**

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