

Introduction to the connect portal

An easier way to help put your clients
in control of a better later life





A faster way to deliver better outcomes for your clients

From application to completion, our connect portal provides a paperless, seamless, end-to-end digital journey designed to get your client to completion faster.

With KFIs in seconds, application submissions in minutes, and automated instructions to valuers and solicitors to minimise delays, our portal connects you and your client to the lending solution they need with proven 24/7 technology.

Plus, you can track your client's case in real-time while communicating with your dedicated Caseowner and Adviser Support Team, ensuring you always have the support you need from start to finish.

Let's get started...

To access the connect portal, [click here](#). Alternatively, visit the connect portal homepage at standardlifefinance.co.uk and click on connect portal in the navigation menu. From there, you can either login or create an account.

Register for an account

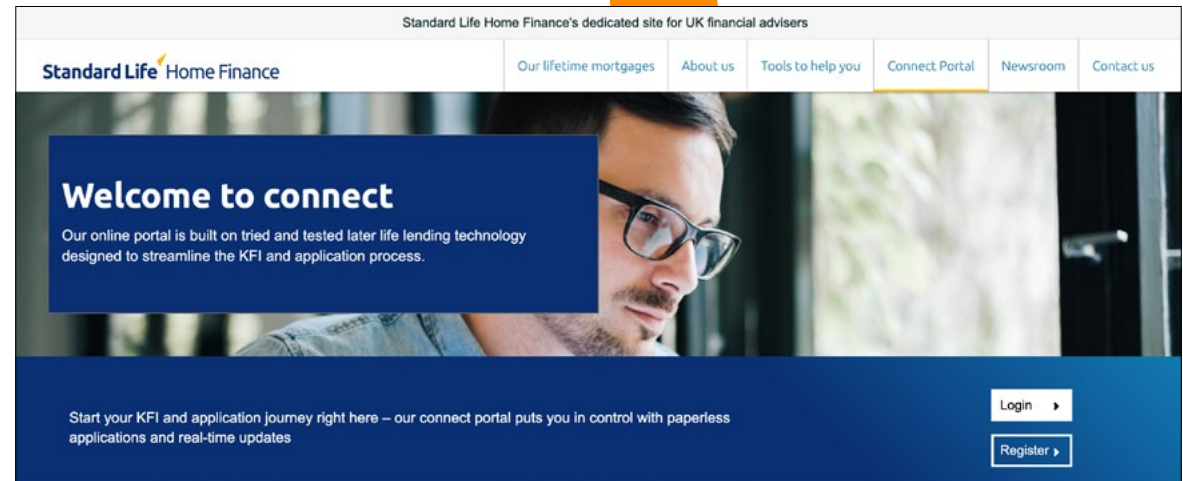
It's easy to register, you'll just need your personal and company details, such as your FCA number. Once you've registered, you'll receive an email from our Adviser Support Team confirming your account is ready and details on how to get in touch should you need them.

Login to the connect portal

To login, you'll need your username and password. If you've forgotten your password, simply click Forgotten Password? on the screen and we'll guide you through how to reset it.



Connect portal homepage



Registration page

Firm details

Your Firm FCA number *

* Mandatory fields

Login page

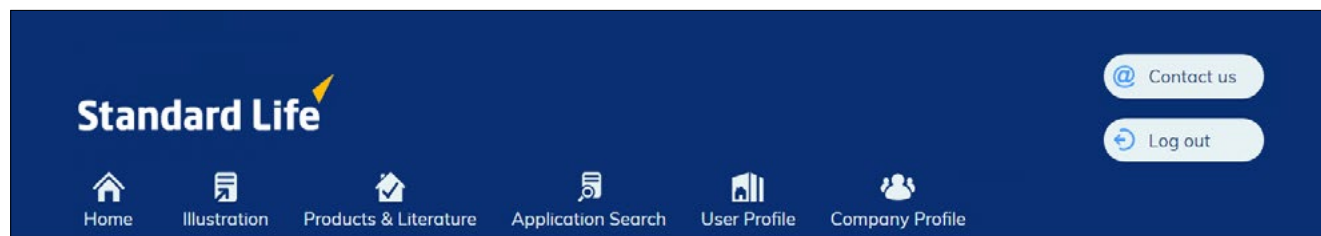
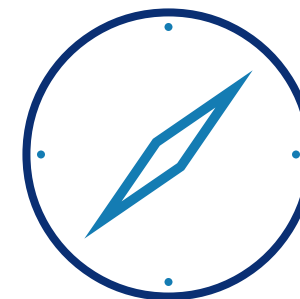
Log-in Details

User Name *

Password *

Forgotten Password? >

Navigating the connect portal



Connect portal top navigation bar

Home

This page has a brief introduction on how connect can support you, and any servicing updates can be found under servicing messages. If maintenance is scheduled or we're experiencing any issues regarding the portal, we'll let you know here.

You'll 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 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.

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 to specify amounts, fees and other details.

Products and literature

This button will guide you back to our website where you'll find everything you need to know about the range of plans we offer, including current rates, LTVs, features, lending criteria and our plan guides.

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 lets you find old KFIs, as well as declined and completed cases.

It's simple to use, just provide either your client's surname, postcode or case reference number, and we'll display your saved data from the applicant bank.

User profile

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

submission route list; which allows you to personalise which club you want to assign each case to.

You're able to register with multiple clubs, but each case can only be submitted to one club, which is chosen at KFI stage.

Important information

You must select the correct submission route to ensure that you get paid the correct commission when a case completes. You can check and update your submission route in the 'User Profile' tab, by selecting '**Change my Submission Route list**'

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@standardlifelifehomefinance.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 log out.

Creating a KFI

To create a KFI, first enter the **Illustration** tab at the top of the page. From there you'll be required to enter some basic information about your client, including their DOB and their property's estimated value, as well as answer some simple questions about their property.

Further, more in-depth information around both your client and their property will be required at the application stage, but by entering this initial information, you can gain access to an indicative figure and accompanying illustration.

* Check all required fields are populated before proceeding.

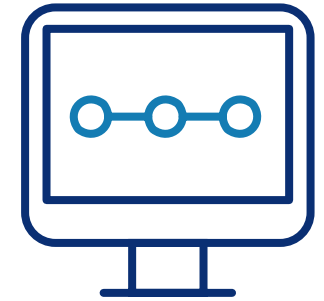


Illustration tab

Applicant: | Case Reference:

- Submission Details
- Personal Details
- Product Selection
- Fees
- Illustration Summary

Submission Route Details

What level of advice is given? *

Advised
 Non-Advised

Is the Application being submitted via a Mortgage Club? *

Yes No

Plan Details

Is this a re-mortgage of your existing home? * ⓘ

Yes No

Estimated value/purchase price *

Property Details

Property Description *
Select

Postcode

Is the property sheltered accommodation? *

Yes No

Important
Before you submit your KFI make sure you select and enter your **Mortgage Club** details to ensure you are paid correctly.

Application summary



Once the KFI is created, connect will create an application summary page where you'll 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 can also monitor the case's progress as well as find out more information on how to submit the KFI to application via the **Proceed to Apply** button. There's also supporting documents here beyond the KFI, such as a blank application form for data capture.



Please note, you don't have to fill out a paper application, as the connect portal is entirely digital. However, if you'd prefer, our printable blank application can be downloaded from our website and used for face-to-face data capture.

Summary page

— Summary for Case

8003499

— Loan Type / Purpose

Residential, Remortgage

Applicant Name(s)	Test#01, Test
Initial Loan Amount	£20,000
Est. Valuation	£300,000
Estimated Term	19 Years
Property	-
Solicitor	-
LTV	7%
Product	Horizon 300 Drawdown Fee Free 2.64%
Drawdown Facility Amount	£38,500

— Illustrations

Please ensure you save copies of any illustrations that you are not proceeding with, that you may need, as these will not be available once you proceed to DIP

Product	Loan	Fees Added to Loan	
Horizon 300 Drawdown Fee Free 2.64%	£20,000 19 years	£0	View Illustration Select > Proceed to Apply Select > Amend KFI Select >

— Fees and Features

Funds Transfer Fee	£30
Legal Fee	£510
Procuration Fee	£530

Submitting an application



Application submission

If you need to change the amount your client wants to borrow, or want to select a new product, you should do that before you submit your application. Remember when selecting a product click, to click **Add Product** and to press **Next** to confirm your selection. Once you're happy to submit your case, you'll be taken through the application process. This is far more in-depth than the KFI creation, and requires more details about your client as an individual, their property and details about their credit history.

Once you're done, click **Proceed to Apply** just above the KFI document section of the summary page and your client's application will be sent to our team to review.

What happens next?

Once the application is submitted, several things will happen instantly. A valuation will automatically be instructed, and a credit check will also run against your client, along with an internal authentication process to confirm your client's address.

If any further information is required, you'll be contacted via email or phone by our Underwriting Team. It's important to ensure the email address and other contact information you provide for yourself is correct so we can get in touch with you and progress your case as quickly as possible.

Staying up to date

As well as email updates regarding your cases, we'll also update details about any open cases within each client profile page.

This will be outlined under the **Note** section, where you'll also be able to type notes directly to our Caseowner Team.

* Check all required fields are populated before proceeding.

The screenshot shows a web application interface for submitting an application. At the top, there is a dark blue header with a user icon and the text "Applicant: | Case Reference:". Below the header is a sidebar with five menu items: "Submission Details", "Personal Details", "Product Selection", "Fees", and "Illustration Summary". The main content area is divided into three sections:

- Submission Route Details:** Contains two questions. The first is "What level of advice is given? *" with radio buttons for "Advised" (selected) and "Non-Advised". The second is "Is the Application being submitted via a Mortgage Club? *" with a toggle switch set to "No".
- Plan Details:** Contains two questions. The first is "Is this a re-mortgage of your existing home? * @" with a toggle switch set to "Yes". The second is "Estimated value/purchase price *" with an empty text input field.
- Property Details:** Contains three questions. The first is "Property Description *" with a dropdown menu showing "Select". The second is "Postcode" with an empty text input field. The third is "Is the property sheltered accommodation? *" with a toggle switch set to "No".

Technology designed to help you transform your business



Paperless and signatureless process



Go from KFI to application submission in minutes



Real-time updates on your case's progress



Send notes directly to our Caseowner Team



Full back-up from our Adviser Support Team



Standard Life
Home Finance

Find out more

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standardlifefinance.co.uk

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