

Standard Life
Home Finance

Introduction to creating a KFI

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



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.

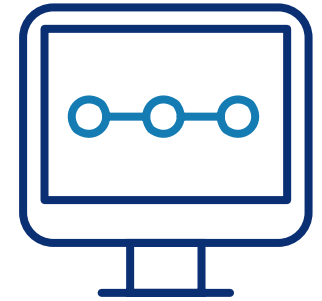


Illustration tab

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
Procurator Fee	£530

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Find out more

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