



**therightretirement**  
package

# Roll into Retirement...

With  
**The Right Mortgage Retirement Package**

Intermediary use only

# Are you planning for your retirement but unsure what to do with your client book?

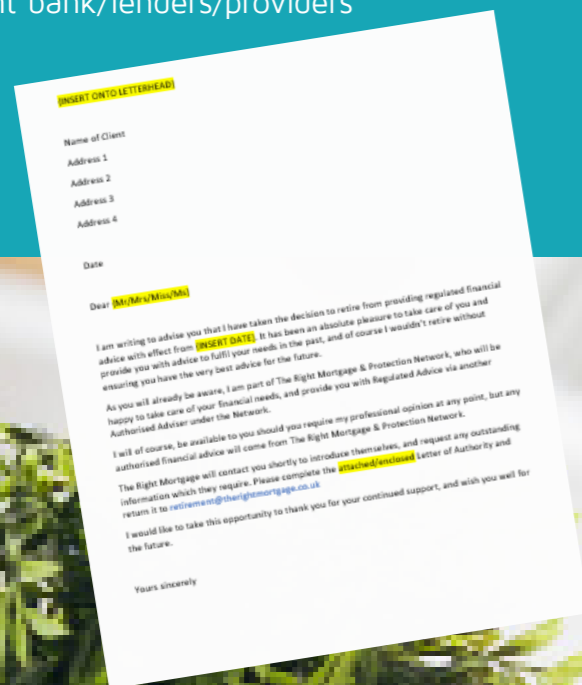
## We can help!

With our retirement package, you can pass on your client book to us and on retirement, 75% of commission will be paid to you for existing business and 50% for new business. This provides peace of mind that your clients will continue to be looked after, as well as creating a great income stream for you.

Should the worst happen to you and you're no longer around, we will continue to service your client book with 50% passed to your beneficiaries.

## How does our retirement package work?

- 1** Sign and return our short contract and let us know when you plan to retire
- 2** Prior to your retirement date, we provide you with simple letter templates to use to contact your client bank/lenders/providers
- 3** Upon retirement, we will contact your client bank and ensure they continue to be looked after
- 4** 75% of commission will be paid to you for existing business and 50% for new business
- 5** Should the worst happen to you and you're no longer around, we will continue to service your client book with 50% passed to your beneficiaries



## It's easy to sign up



### Get in touch

Contact us via [retirement@therightmortgage.co.uk](mailto:retirement@therightmortgage.co.uk) or call 01564 732 744



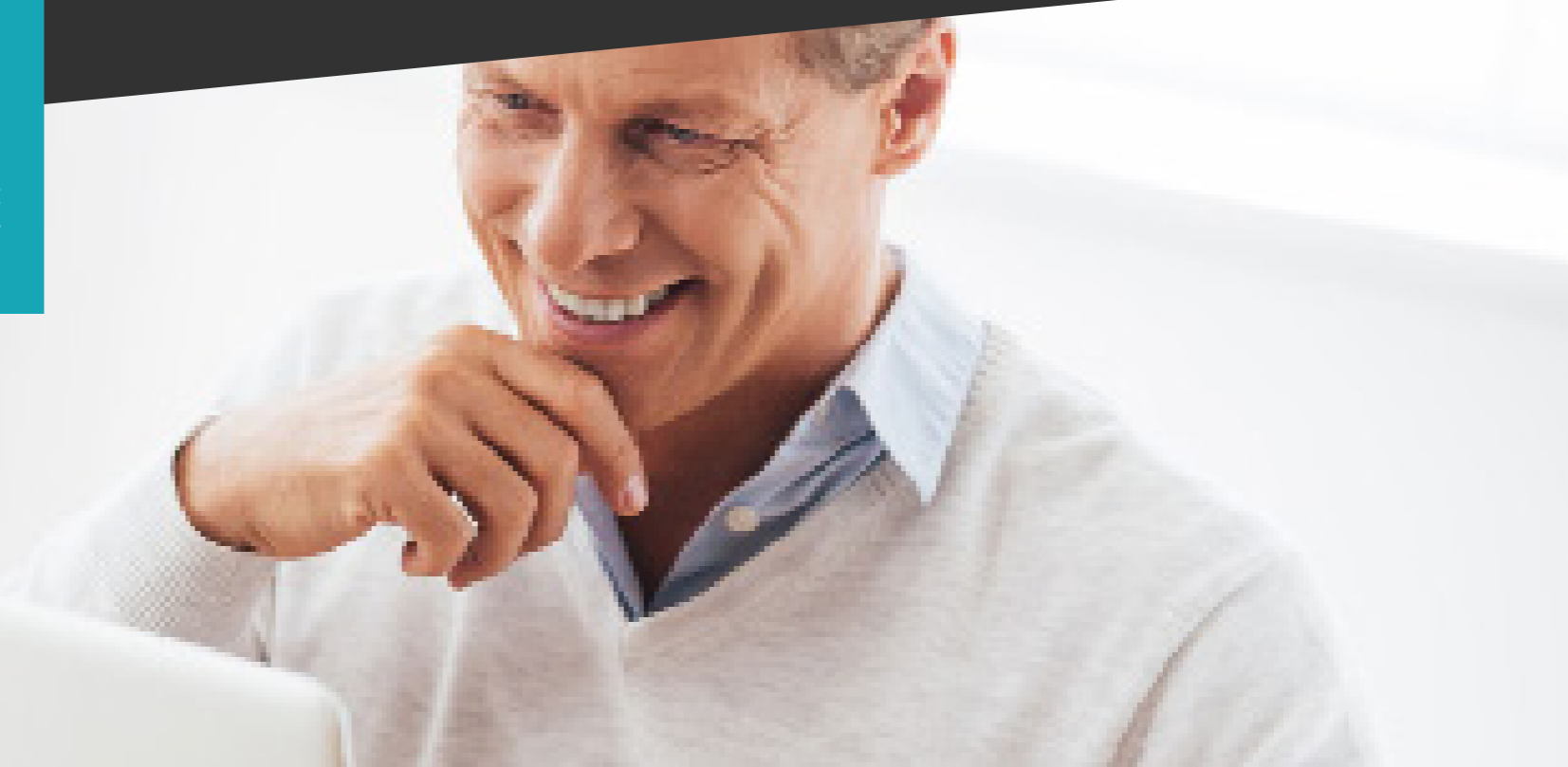
### Short contract

Sign and return our short contract and let us know when you plan to retire



### Relax

Relax and know that when you retire, your clients will continue to be looked after and you will have a great income stream



# Who are we?

We are a network involved in mortgages, protection, general insurance, medical insurance, later life lending and equity release. In 2018, we reached 400 members and turned over circa 20 million. We have become one of the fastest growing financial services networks in the UK, due to our core values aligning with our customers values and understanding what they are looking for from a network.

Our objective is to build a network with 500 member firms and we have promised our members we won't exceed this, so we are always able to maintain our personal approach. Our objective is not to be the biggest but to be the best network, our members know who we are and we work together.

# Our core values

Trust



Respect



Partnership



# FAQs

**Is there a minimum age requirement?**

No, you are free to retire at any age.

**Is there a minimum client bank requirement?**

No, we will accept any size client bank and ensure they continue to be looked after.

**What is classed as new business and existing business?**

Renewals are classed as existing business and this is paid out at 75%. New business is where we provide your clients with new advice and you will receive 50%.

**Will you provide me with any necessary templates to enable me to contact my clients and lenders/providers?**

Yes, we will provide you with everything you need to ensure a smooth transition into retirement.

**If I die before retirement, are my beneficiaries still eligible to receive an income?**

Yes, providing we have all of the relevant information we will begin servicing your client book and pay your beneficiaries 50% of all income

**Does my commission need to be paid into my company bank account?**

We can pay your commission into a personal bank account

**I am thinking about retiring but I don't have a specific age in mind.**

That is absolutely fine. We will get everything set up in the background as we only require a months' notice prior to retirement.

**Can I transfer my clients in stages by product?**

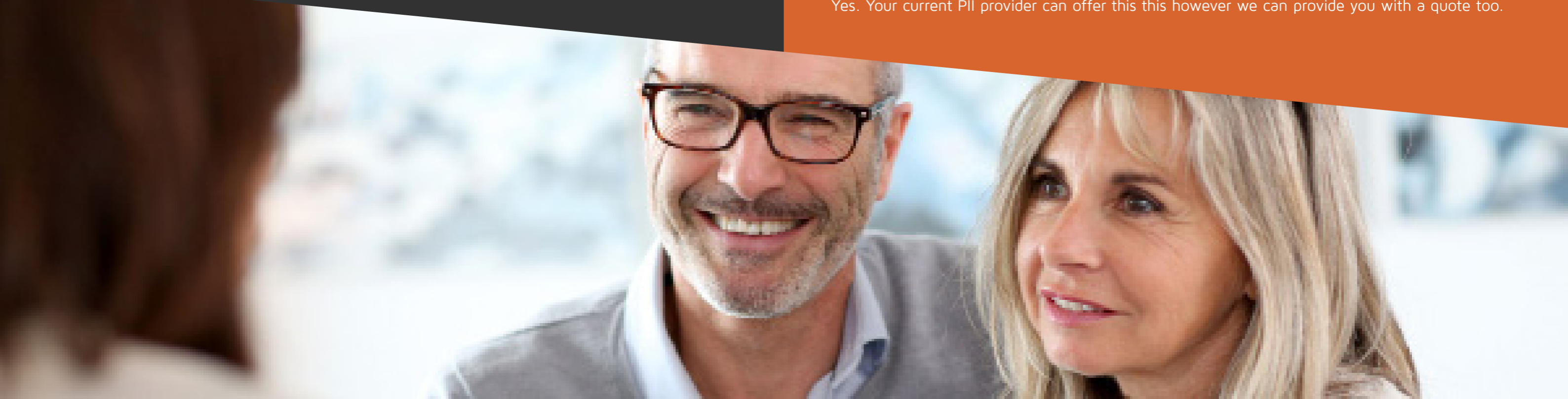
Yes, this is possible.

**When is commission paid?**

Commissions are paid on a monthly basis

**Do I need run-off cover?**

Yes. Your current PII provider can offer this this however we can provide you with a quote too.





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# Get in touch today for more information

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