Pure Retirement Launches AI Criteria Chatbot for Advisers

Pure Retirement has launched an AI-powered criteria chatbot designed to help advisers quickly answer queries about lending policy.

The new tool, called Lenny, will allow advisers to get support with cases and determining their clients' eligibility 24 hours a day.

- Get to the right lending criteria answers faster
- Ask follow-up questions in a natural, chat-style conversation
- Download the information as a PDF, for audit trails

Registered advisers can [log into Pure's adviser portal to chat with Lenny.]

Head of Distribution, Scott Burman, says:

"Being able to offer new ways for advisers to receive quick responses to criteria queries 24/7, underlines our commitment to supporting all the market, all the time in best serving clients and helping them to achieve their financial goals in later life."

The new chatbot exists alongside Pure's Intermediary Sales support team, who are on hand to help.

Unlock Later Life Lending Opportunities with Confidence

Pure Retirement's later life lending opportunities resource explores how mortgage advisers can broaden their offering to support clients aged 55+ with evolving borrowing needs.

The page outlines introducer and equity release qualification pathways, alongside key scenarios where lifetime mortgages may be appropriate, ranging from supplementing retirement income to managing existing borrowing or supporting family members.

It reinforces the importance of delivering holistic advice, positioning later life lending as one of several tools available when aligned with client objectives and suitability. The resource reflects the lender's commitment to responsible lending and supporting advisers in developing their later life lending expertise.

Discover how Pure Retirement can help enhance your later life lending conversations by visiting the page today >

A New Way to Network from Pure Retirement: Netwalking

Specialist lifetime mortgage provider Pure Retirement introduces a brand-new series of free and regional networking events designed to help advisers build meaningful professional connections in a relaxed environment throughout June and July.
No meeting rooms and no name badges, just flowing conversations, fresh air and friendly faces.

What is Netwalking?

Netwalking aims to bring together professionals from the lifetime mortgage industry for a walk through a local outdoor space, hosted by one of Pure's regional Business Development Managers.

Each event is free to attend and open to everyone. Spaces are limited for each event, so please reserve your spot as soon as possible.

Please note that events will be cancelled in adverse weather. Participants are advised to wear appropriate footwear and dogs are also welcome, but must be kept on a lead at all times.

Reserve your spot here>

Insight on Title and Ownership Complexities by Pure Retirement and Adlington Law

Pure Retirement, in partnership with Adlington Law, has outlined key risks associated with tenants in common arrangements, trusts and title splits in lifetime mortgage cases. The article highlights how ownership structures used in estate planning can create legal complications, potentially requiring trusts to be restructured before lending can proceed.

It explores land and title splits, warning that changes to registered titles can introduce risks around ownership, access and legal rights. Scenarios like landlocked properties, missing easements or unregistered titles can delay or prevent completion if not identified early.

Engaging specialist solicitors at the outset can help resolve complex scenarios efficiently. In the equity release market, a basic title check early on, plus a few targeted questions with your client, can help you spot complications, manage expectations and avoid surprises later.

[Visit Pure Retirement's website to read this article>]

Supporting Advice Conversations with Practical Illustrations

Pure Retirement has developed a suite of lifetime mortgage calculators designed to help advisers clearly demonstrate how different repayment approaches may influence client outcomes.

The partial repayments calculator highlights the impact of making optional repayments over time, while the annual overpayments and ERC calculator highlights the effect of ad hoc lump sum payments and potential early repayment charges.

Together, these tools are designed to support more informed client discussions, giving you and your clients greater clarity on how lifetime mortgages can align with individual circumstances.

Advisers can explore Pure Retirement's lifetime mortgage calculators via the lender's website.