Helping advisers get applications off to a strong start

Packaging a lifetime mortgage application with the right information upfront can help reduce avoidable delays by giving underwriters a clearer picture from the start. To support advisers, specialist lifetime mortgage provider Pure Retirement has compiled a practical pre-application checklist covering key areas to consider before submitting a case.

The checklist highlights areas including property condition, flood zones, proximity to commercial properties and tenure, providing advisers with a useful overview of what to consider before submission.
It's designed to help flag anything that may need further review, particularly where property details or customer circumstances could affect the application journey, helping advisers prepare cases with greater confidence.

Please note: Each case is assessed on its own merits and is subject to Pure's lending criteria. The checklist is intended as a helpful guide rather than a guarantee of acceptance.

Download the pre-application checklist >

THIS INFORMATION IS FOR USE BY FCA AUTHORISED INTERMEDIARIES ONLY AND MUST NOT BE DISTRIBUTED TO POTENTIAL BORROWERS.

Pure Retirement Enhances Case Tracking to Give Advisers Greater Visibility

Specialist lifetime mortgage provider Pure Retirement has enhanced its adviser portal, giving registered advisers greater visibility of case progress and helping them keep clients informed.

Updates to its case tracker make it easier to find and monitor applications throughout the journey. Advisers can filter cases by status, from KFI stage through to valuation and completion, while each client's current status is clearly displayed alongside their name.

The tracker also provides greater detail on progress, with advisers able to hover over the progress bar to see exact dates for completed stages.

Registered advisers can access the updated case tracker by logging into Pure Retirement's adviser portal. Advisers who are not yet registered can sign up online to access the portal and its range of adviser tools and support.

THIS INFORMATION IS FOR USE BY FCA AUTHORISED INTERMEDIARIES ONLY AND MUST NOT BE DISTRIBUTED TO POTENTIAL BORROWERS.