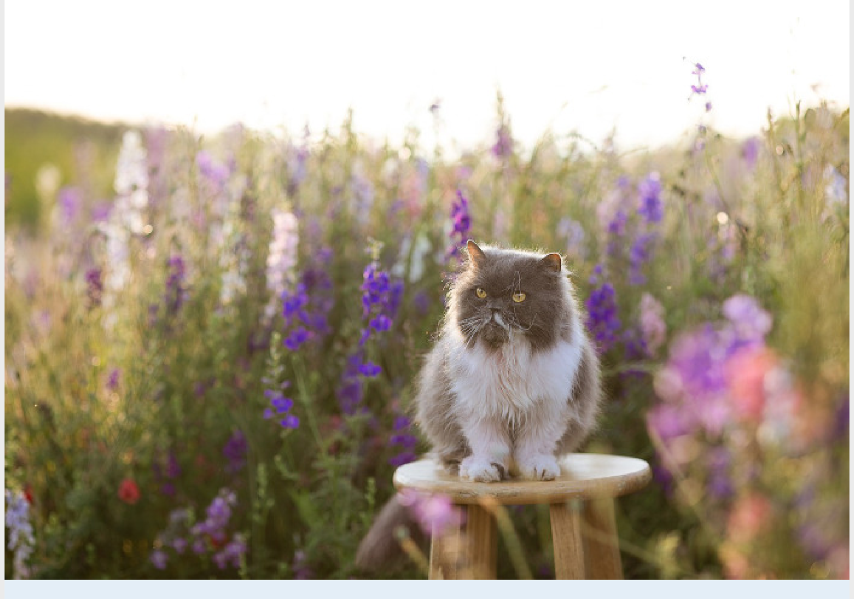
Pure Retirement

Your May Update



Good morning,

Welcome to our May update, a one-stop summary of some of our key business announcements and resources.

This month, we bring you news of our lifetime mortgage roadshow, additions to our Heritage criteria, our latest resources to help you make the most of market opportunities, and an update on our service levels.

Jane Mullan, National Field Sales Manager

We're on LinkedIn - don't forget to follow us!

In Focus

Are you coming to our Lifetime Mortgage Roadshow?

Join us at our Pure Lifetime Mortgage Roadshow, taking place in London on June 14th! We'll be focusing on the specific issues facing advisers in London and the South East, including property specifics and things to consider when advising high net-worth clients. Expect to delve into inheritance tax, property conveyancing, underwriting criteria, later life market trends, and technology in a series of insightful discussions and presentations. Places are limited - secure your place and register today!

Click here to register

Heritage Range

We've launched new criteria additions to our Heritage range!

The range can now consider:

- No maximum limit on IVAs*
- No maximum limit on DMPs*
- The ability to consider steel framed properties built post-2000
- Acreage increased to 10, with the ability to refer to funder if more (previously 5)

(*subject to them being paid on completion)

Click here to learn more about Heritage

Business Update

Consumer Duty Resources

We've added two new blogs to our Consumer Duty resources, meaning we now offer guides to all three of the cross-cutting rules courtesy of our Compliance Director, Ed Halliwell. Visit our dedicated page to catch up with them and to register for our series of webinars.

Find out more and register

Meet Your New Telephone BDM

We're pleased to announce Becky Sumner as our new Telephone BDM for the Central and East region. Becky has 14 years of experience within the equity release market, making her ideally placed to support her area. She says: "I aim to use my experience to assist brokers in my region, giving them the support, they need to help their clients."

She can be contacted via: 0113 366 8572, or Rebecca.sumner@pureretirement.co.uk

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New Toolkit Resources

We've added digital assets to our Adviser Marketing Toolkit! The new testimonial templates allow you to easily turn the positive feedback you receive from introducers and customers alike into social imagery. Stay tuned for the latest edition of our Quarterly Report too!

Click to learn more

Read Our Market Opinion

Over the past month, some of our senior members of staff have been sharing their views on the current state of the market. This has included Chief Commercial Officer John Wilson for MoneyAge discussing adviser support and consumer outcomes, and CEO Paul Carter on wider market conditions for Iress.

Our Year To Date Service Levels In Numbers

We've provided market-leading pre-completion service in 2023, with key highlights including:

- 96.6% of applications processed within two hours
- 100% of applications processed on the day of receipt
- 99.9% of brokers' emails to underwriters actioned in four hours
- 99.8% of valuations assessed on day of receipt

We look forward to continuing to support you and clients throughout the rest of the year!

Moneyfacts ILP Awards

Thanks to everyone who voted for us during the Moneyfacts ILP awards nominations process - we're all incredibly proud to have been listed as finalists in the Best Equity Release Provider, Best Equity Release Service, and Innovation categories. We're really pleased to see all of our hard work resonate with our adviser network, and we look forward to build on it over the rest of 2023 and beyond.

Upcoming Events

- Pure Lifetime Mortgage Roadshow, London, 14th June
- Consumer Duty And Vulnerable Customers: Are You Prepared? 7th June
- How Are Pure Retirement Embracing Consumer Duty? 21st June
- Property Condition Risk And Underwriting, 28th June

In the News

- Only 6% of over-50s fully understand equity release
- Wealthier borrowers twice as likely to gift ER proceeds
- 64% of Brits do not feel confident about their retirement

Customer Feedback

> “I found all your staff very pleasant and explained things in detail, especially when I didn't understand anything. Thank you!”
>
> **Mrs Wilkins, Huntingdon**

> “I am absolutely impressed with your efficiency, clarity, helpfulness, in fact everything. I would recommend you to anyone”
>
> **Mrs Joy, Caerphilly**

Here to support you as always

Available on the ADVISE WISE sourcing platform

See our reviews on Trustpilot