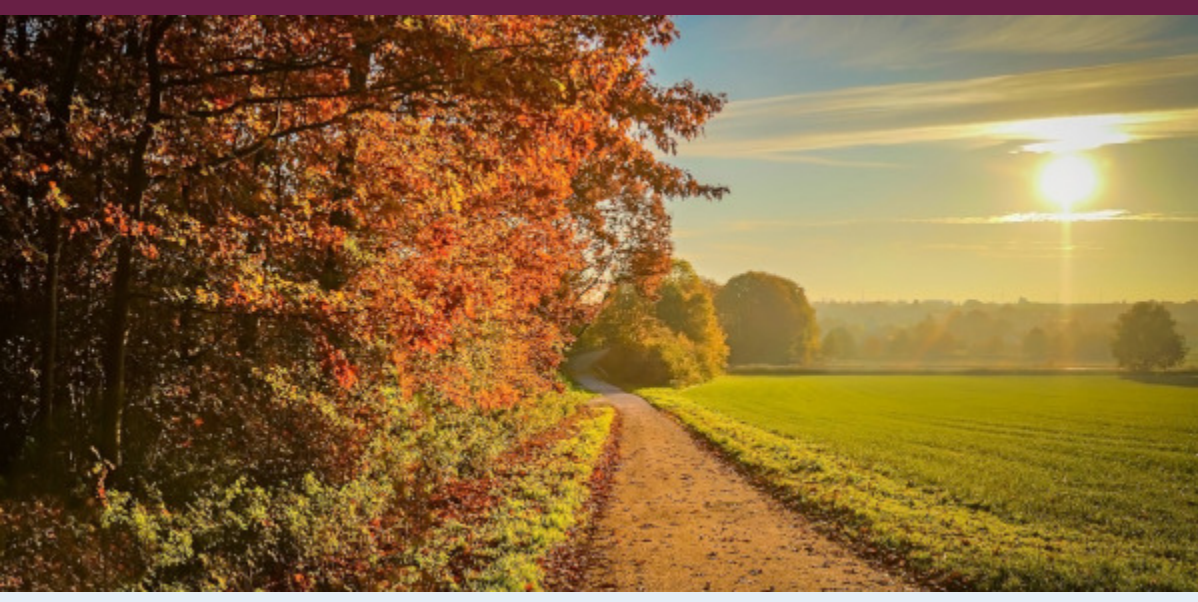


## Your September Update



Good morning,

Welcome to our latest monthly update, a one-stop summary of some of our key business announcements and resources for September.

Learn more about our recent product updates, including the exciting reintroduction of our Freedom range, as well as news of our latest resources to help you best serve your clients, and a round-up of our recent industry opinions.

Jane Mullan, National Field Sales Manager

[We're on LinkedIn - don't forget to follow us!](#)

### In Focus



#### Penalty-Free Large Repayments, With Our Freedom Range

We're pleased to announce the reintroduction of our Heritage Freedom range, offering customers the ability to repay either 20% or 40% of their loan each year ERC-free, depending on the product they choose.

It's ideal for those who want to make either high-value monthly payments, or a single large payment from an anticipated future lump sum, from the likes of a pension pot, inheritance or investments.

Other key details include:

- ☒ Available to applicants aged 55-80
- ☒ LTVs of up to 37%
- ☒ Minimum property value: £70,000 with no maximum
- ☒ Loan sizes of up to £800,000

[Click here to learn more](#)



#### New Resources For You

As part of our commitment to providing you with the tools to best serve your customers, we've continued adding to our range of resources. These include:

- ☒ [A collection of client scenarios](#) detailing how our products could help clients
- ☒ [A guide to spray foam and the important conversations to have with prospective applicants](#)
- ☒ [Our new customer-facing About Us document](#), helping give your clients more information about us as a lender
- ☒ [Our Q2 quarterly market report](#) (stay tuned for our Q3 edition, landing soon!)

### Business Update



#### Have Your Say In Upcoming Awards

We're thrilled to have been shortlisted for Best Equity Release Lender and Best Equity Release Lender Service categories at the upcoming Personal Finance Awards - [make sure you have your say before October 22nd](#), we'd love it if you considered voting for us! Also, thanks to everyone who votes for us at the Moneyfacts ILP Awards - we were thrilled to win Best Equity Release Service!



#### Sharing Our Industry Expertise

Our Head of Distribution, Scott Burman, recently contributed to [Mortgage Introducer's deep dive into the later life lending sector](#), and has also analysed our H1 loan usage data for [Iress' industry voice](#) and discussed what it could mean for future customer and industry trends.






#### Continuing To Deliver Great Service

We're proud to continue offering market-leading service in 2023 across a range of metrics. Did you know that in August we saw:

- ☒ 98.4% of applications processed within two hours
- ☒ 100% of applications processed on day of receipt
- ☒ 100% of broker emails actioned within four hours
- ☒ 100% of valuations assessed on day of receipt

### In the News

-  [93% of financial advisers believe property wealth should be incorporated into retirement planning](#)
-  [A third of all workers have investigated reducing or stopping their pension contributions](#)
-  ['Retirement anxiety' is increasingly becoming an issue for over 40s](#)

### Customer Feedback

”

“All the account managers I have recently dealt with, were patient and responsive. Couldn't ask for better service”

**Miss Bonner Fox, Bristol**

”

“All staff have been extremely helpful, especially in the beginning when I was going through a very difficult time as my wife died while we were going through the process of applying for the mortgage”

**Mr Hadland, Didcot**

#### Here to support you as always

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