

Case Study

Supporting your clients in times of need



The service and support provided for your customers can make all the difference in helping their situation and meeting their needs

Mrs Johnson*

Required crucial loan of £160,000

Mrs Johnson had unfortunately lost her husband and was left with a large interest only mortgage to pay. She was also faced with taking care of the funeral costs on her own and therefore decided to borrow an additional sum.

After seeking help from another lender who was unable to help, she decided on a Pure plan advised by her broker. Mrs Johnson then called our team to find out about the progress of her case, and our underwriters were happy to speak with her on the phone and answer any queries she had.

Due to Mrs Johnson's situation we enabled her to have a direct line to a member of staff who knew her circumstances which meant she did not need to explain herself.

We also kept her broker updated continuously so that she was never left in any doubt that progress was being made.

The offer was made within a week, and the case was completed in just six weeks. Mrs Johnson was extremely grateful for the overwhelming support from our underwriting team, which was greatly appreciated in her time of need.

*Client names have been changed to provide anonymity

This document is for intermediary use only. No advice is being given or implied. It is crucial that customers seek regulated and independent financial advice in choosing the option which best suits their needs.