



The smartER™ equity release referral service

How we enable you to develop a compliant and
profitable equity release revenue stream.



Equity release as a financial solution continues to go from strength-to-strength. With more innovative products continually being brought to market, it offers customers an increasingly flexible way of achieving financial freedom. Through our family of brands we're passionate about making equity release accessible to everyone and, with innovation at the core of everything we do, are positioned to help you make the most of the opportunity it presents. As the market becomes broader, we want to invite you to be a part of its success.

Mark Gregory CeMAP CeRER
Founder & CEO



A family of equity release companies that make equity release work for everyone.



The smartER equity release referral service



The smartER equity release comparison site



Pioneering the future of equity release technology

Refer your clients to the UK's no.1 whole of market equity release service

Our promises

Independent and whole of market

We do not have an institutional lender and we are independently owned, meaning our advice is always impartial and bespoke for each client.

Employed advisers

All partnership advisers are employed and supported by Equity Release Supermarket so you know exactly who is advising your client.

No cross selling

Equity release is our only service, that singular focus is what helps us be the best*.

Innovative technology

We are the only specialist with smartER™, the UK's only client facing equity release comparison tool. Our partners can have this to use alongside other intuitive calculators and tools to enhance the client experience and put them in control.

Unique commercials

Unlike others, we can pay both for leads and when the case completes, giving you maximum return for your efforts to embed equity release as part of your business.



Award winning, impartial advice from the whole of the market



Exclusive customer deals that only we have access to



Market leading administration and compliance support, ensuring total peace of mind



Our case tracking software means you can follow customer progress



Highly trained, qualified advisers that are focussed on meeting customer needs



A dedicated case handler ensuring your customers have the best possible experience



Deployable technology to give your customers a world-class journey



Pioneering a new approach to commercial incentives, aligning to fair value assessment



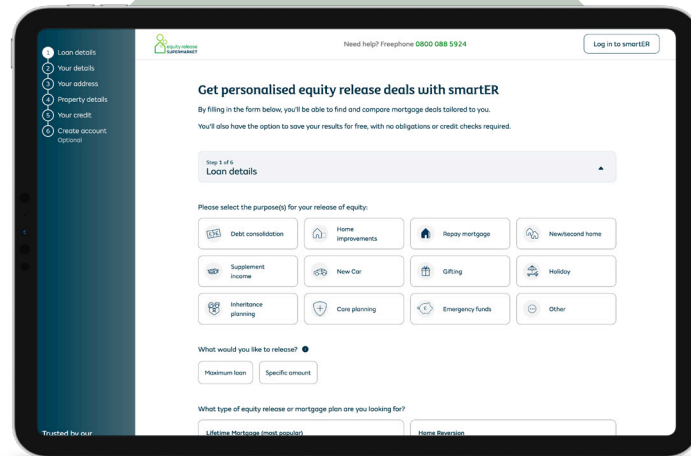
Sales and marketing support to support your marketing strategy

*Best Equity Release Broker - What Mortgage Awards 2024



Market leading technology

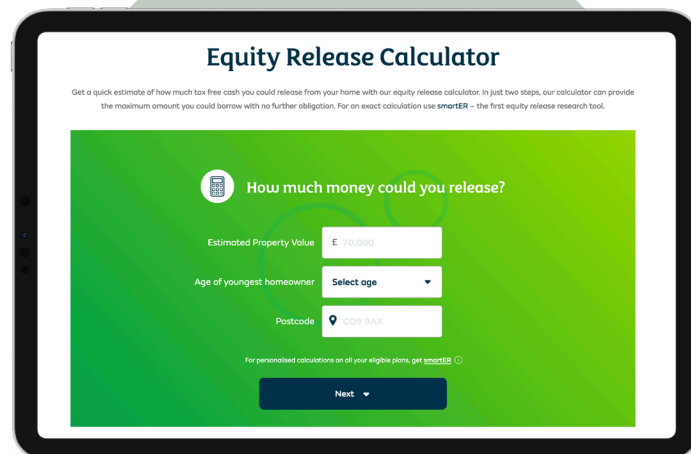
A suite of technologies that enhance the experience for your audience



smartER™

As the only intelligent digital equity release research tool, smartER™ revolutionises how consumers search for equity release by giving them the power and control to browse product rates and features.

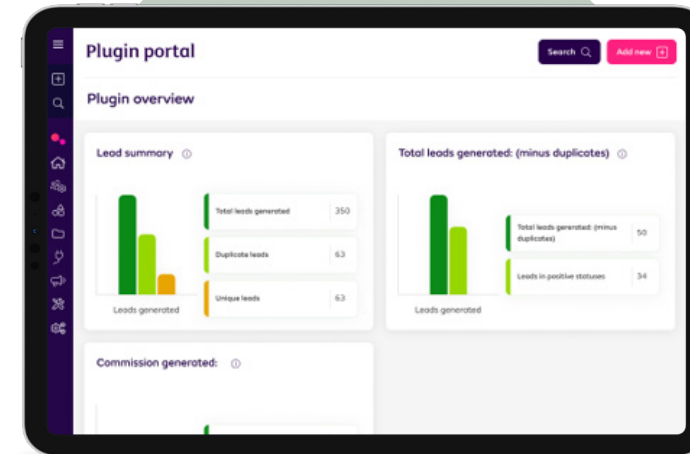
Our selected partners can have smartER™ integrated into their website to help ensure an educational and fulfilling customer experience.



Calculators

Our suite of maximum loan and analysis calculators enable clients to learn more about equity release at the same time as generating leads for your business.

Uniquely driven by real-time lender data, our calculators cater for any prospective client wishing to conduct their own equity release research. We'll give you a choice of 12 calculators you can plug into your website.

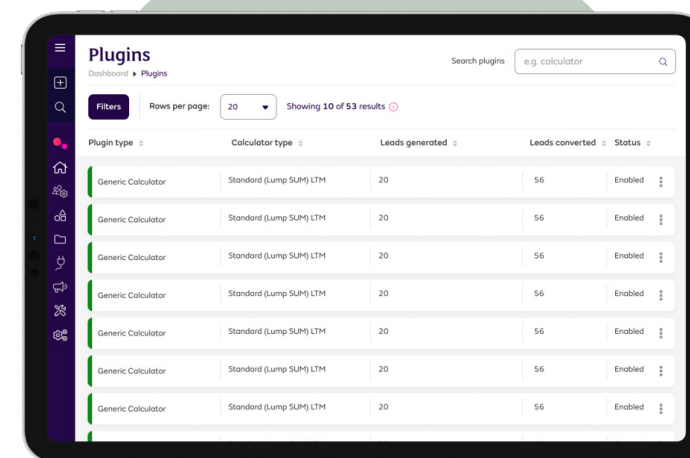


trackER

Online case tracking facility, keeping you updated 24/7 on the progress of your referred leads.

At key stages of the process automated email updates are sent to your inbox ensuring you are kept up to date.

trackER includes a bespoke dashboard providing full visibility of every lead generated, enabling firm principals to monitor performance and remuneration.



Partner platform

Providing access to a range of 'plug and play' lead generation tools that have been tried, tested, and continually improved since 2008.

These tools include smartER™, calculators, comparison tables and find an adviser widgets – all are available to integrate into your brand on your own website.



We have been at the forefront of equity technology since 2008 and are committed to investing in driving new innovations that improve the equity release experience for everyone.

Jamie Gregory
CTO

Our people, supporting your business

A connected partnership to help you grow your equity release proposition

More than just paying for leads, we want to help you grow your business and know that the most important aspect of mutually beneficial partnerships are people. This is why we'll ensure you will have a direct relationship with an Account Manager and expert adviser. In addition, your clients have a dedicated case handler ensuring we deliver the best possible experience while help you to generate a compliant a profitable equity release revenue stream.

Client advice team



Will Massey
CeMAP CeRER



Adam Lombardo
CeMAP CeRER



Marc Cookson
CeMAP CeRER



Chris Hunt
CeMAP CeRER



Brian Massie
CeMAP CeRER



Dan Beatson
Certs CII (MP & ER)



Gareth Humphreys
CeMAP CeRER DiPFA



Daniel Pedder
CeMAP CeRER



Paul Newsome
CeMAP CeRER



Paul Massie
CeMAP CeRER



Amy Payne
Senior Marketing Executive



Richard Brook
Chief Marketing Officer



Alison Armstrong
Case Coordinator



Alex Bullock
Case Coordinator



Louise Thompkins
Advice Team Manager

Richard Brook MDip MCIM Chief Marketing Officer

Richard helps firms drive value for clients through proposition development and marketing activity. Richard has a strong commercial background across Finance, Energy, IT and Telecoms. This includes leadership roles within the financial advice and equity release sectors.

Richard is on hand to support your commercial aims through the partnership.



Daniel Pedder CeMAP CeRER Adviser in focus

Dan has over 15 years' experience working as an adviser within financial services. He prides himself on getting to truly know his customers' circumstances and ambitions, in order to recommend the best plan for their needs.

Dan can work with customers based all over the UK, offering appointments by telephone, video call or face to face - whichever the client prefers.



We are proud to have a range of advisers that we have trained in-house while attracting the best advisers from across the industry.

The most innovative commercial model

Creating a sustainable revenue stream for you and your business

Whether you are a mortgage or wealth adviser your clients will look to you for holistic advice and guidance. When it comes to managing their money, your clients will see you as their go-to for different types of financial advice, that includes equity release.

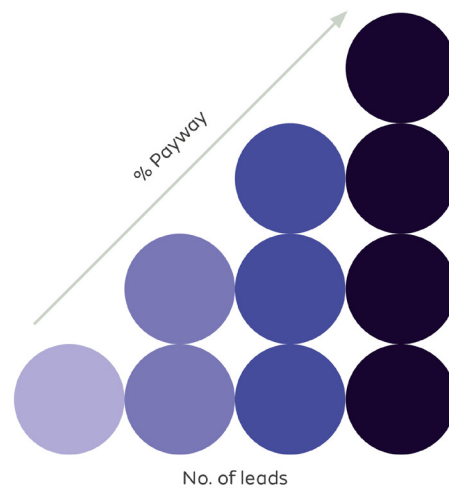
By working with us you can extend your proposition with the UK's no.1 independent equity release advisory service, providing an additional service without carrying the compliance or operations into your costs. You will have peace of mind of knowing that your client is with a specialist that has recently won all industry accolades as well as maintaining an overall client rating of 5.0/5 on the independent review platform, Feefo.



Rewarding your loyalty

As pioneers in the equity release market, we've always looked to do things a little differently and the way we approach rewarding your introductions is no exception.

Through the most innovative, flexible commercial model in the market, we're putting you in control, paying you more up front and are the only business to reward your loyalty by increasing your remuneration the more you refer.



Value beyond leads

We know that true, sustainable business growth comes from much more than the commission you get paid per lead. This is why we've built more value in our service to you and your clients to ensure that your earning potential is maximised.

- Always independent and whole of market
- Qualified expert advisers you have direct access to
- Choice of commercial model
- Branded lead generation technology
- Marketing and business development support
- Track your clients at each step, with auto updates
- No cross selling, we live and breathe equity release
- Access to smartER™; the industry's first and only live search tool
- Exclusive smartER™ products for your clients
- Multi award winning firm for innovation and client service

Maximising your earning potential



Marketing and Business development

Helping you grow your business

Our ambition is to help you grow your business revenues by referring potential equity release clients.

Our suite of training, technology and marketing materials combined with access to your own Account Manager ensures you have everything you need to help your customers and your team internally to make the most of your own opportunity.



Marketing materials to support your own activity



Blog articles to use on your website



Webinar series to arm your team with more knowledge



Industry newsletter filled with the latest trends



White label lead generation tools



smartER™ report providing the latest industry insights



Compliance and client safety

Keeping your customers safe with best in class advice

Compliance and customer safety has always been a fundamental aspect of our business since 2008.

As Compliance Oversight Consultant at the Equity Release Group, Graham Evans is fully committed to providing an excellent client experience. Graham has been a longstanding member of the Standards Board at the Equity Release Council and is leading the implementation of Consumer Duty across Equity Release Supermarket.



Graham Evans
Dip PFS CeMAP CeRER
Compliance Oversight Consultant

Best in class advice



Our independence ensures we offer impartial advice on products from the whole of the equity release market.



We employ the best advisers and provide the most comprehensive training and compliance in every UK region.

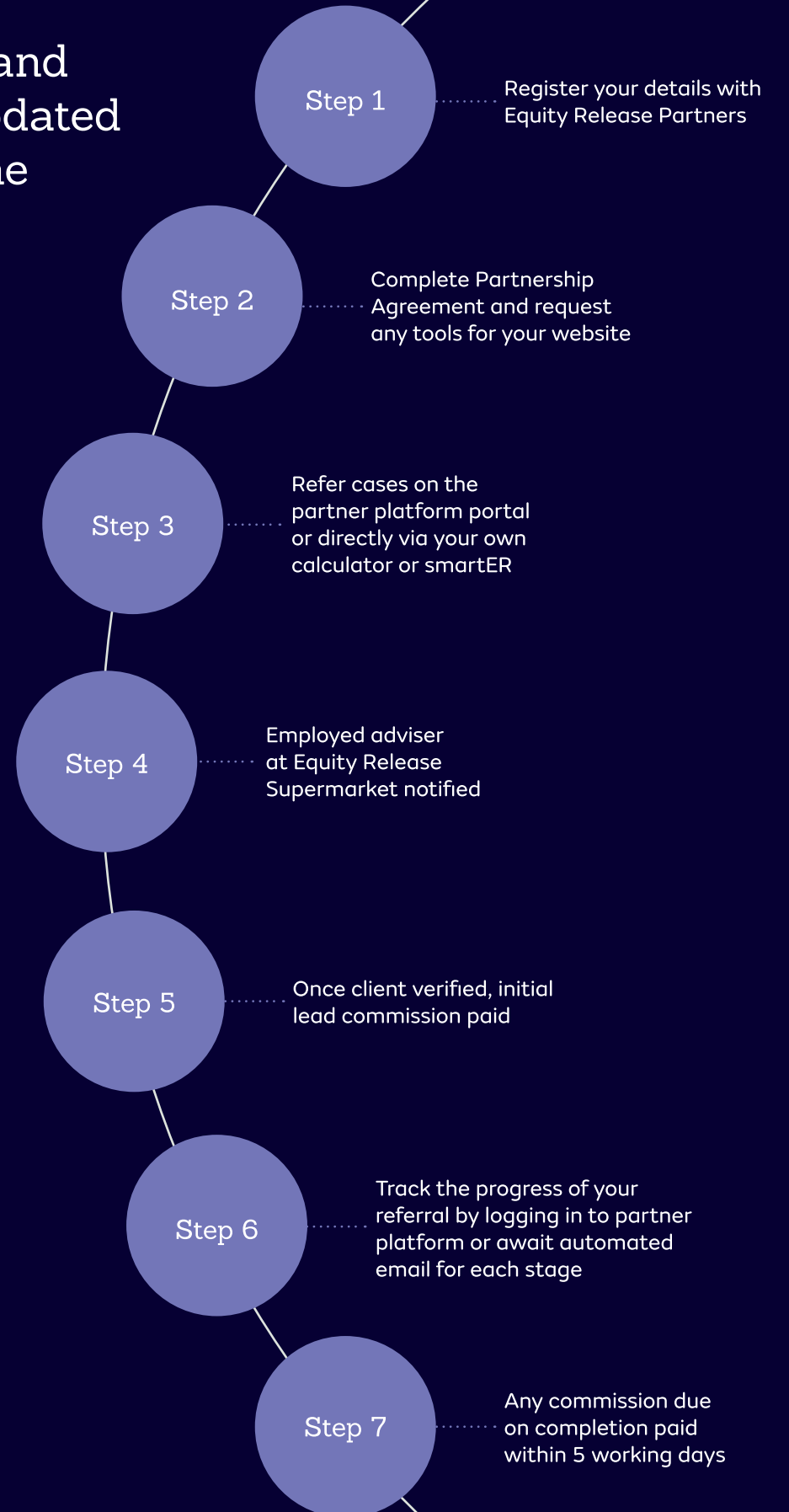


Our advisers are specialists and experts in their field with a total focus on meeting the individual needs of your clients.



Our process model

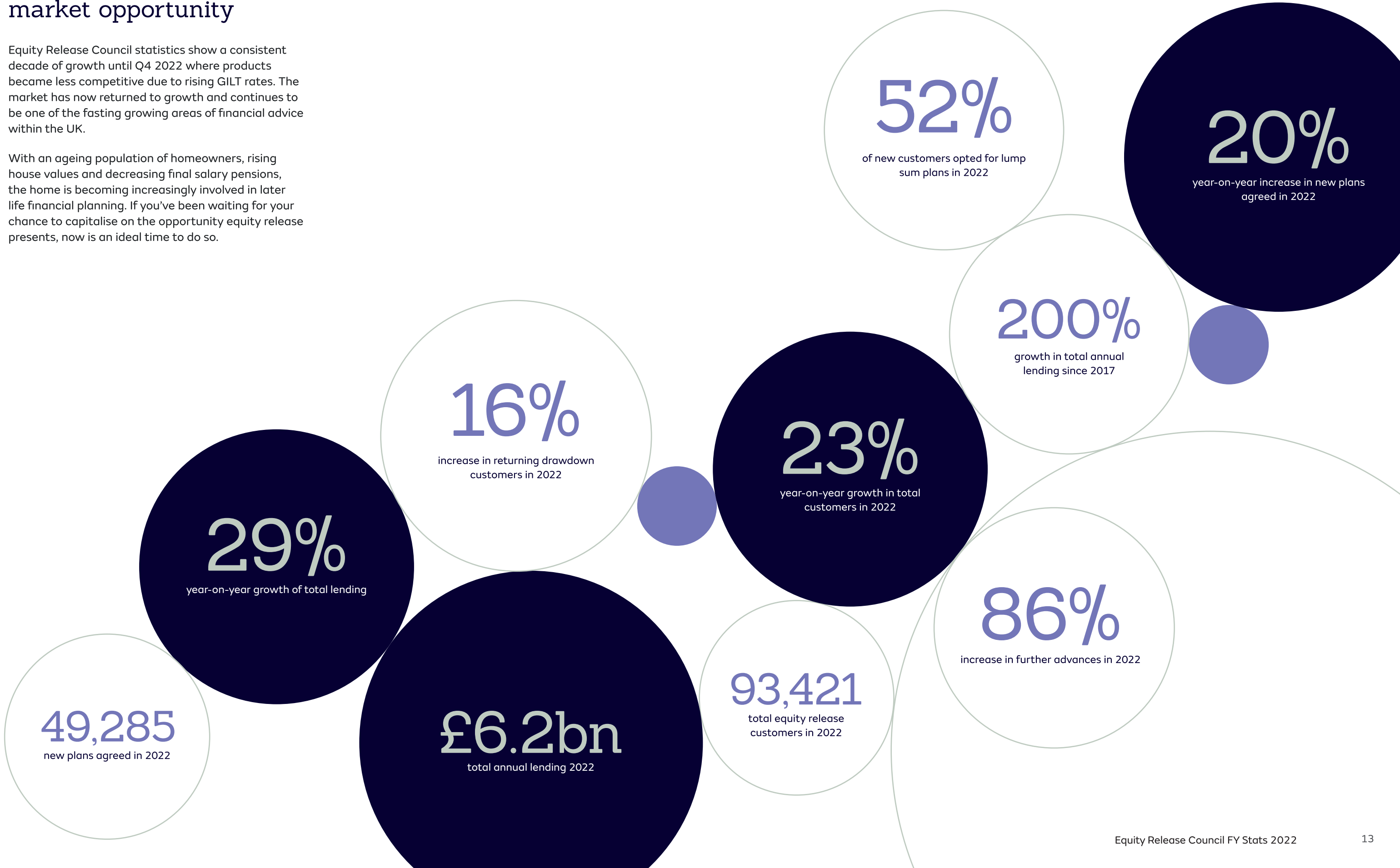
Keeping you and your client updated throughout the process



An attractive market opportunity

Equity Release Council statistics show a consistent decade of growth until Q4 2022 where products became less competitive due to rising GILT rates. The market has now returned to growth and continues to be one of the fastest growing areas of financial advice within the UK.

With an ageing population of homeowners, rising house values and decreasing final salary pensions, the home is becoming increasingly involved in later life financial planning. If you've been waiting for your chance to capitalise on the opportunity equity release presents, now is an ideal time to do so.





equity release
PARTNERS

The smartER™ equity release referral service

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All content within this document is intended for the use of intermediaries only and not for use with customers.

Our whole of market independent equity release advice relates to Lifetime Mortgages, Home Reversion Plans, & Retirement Mortgages. Our advice fee of £1,495 is payable on completion. Equity Release may affect entitlement to means tested benefits and will reduce, or leave no property equity.