



Your Trusted Partner In Mortgage Success



Shared Success



Onsite Advisors



Multiple Lenders



Staff Training



Regular Reports



Account Manager



Client Referrals



Protecting Your Client Relationships



Clear Communication & Smooth Progression



Professional, Reliable Client Experiences

Estate Agency Testimonial

I've worked with The Finance Family for several years and our broker has always been reliable, enthusiastic and completely honest in his approach. He supports our clients professionally, communicates clearly, and consistently delivers a smooth mortgage process from start to finish. He's a safe pair of hands and an excellent partner for any estate agency looking for a dependable mortgage advisor.



Our Introducers



Mortgage Submission Platform

Track | Manage | Incentivise



Submit

Quick forms capture all the info we need



Track

Real-time pipeline visibility for your teams



Manage

Dashboards and reporting tools



Reward

Automated rewards for motivation



27 Brokers

Working with The Finance Family



100+ Lenders

For your clients to access through us

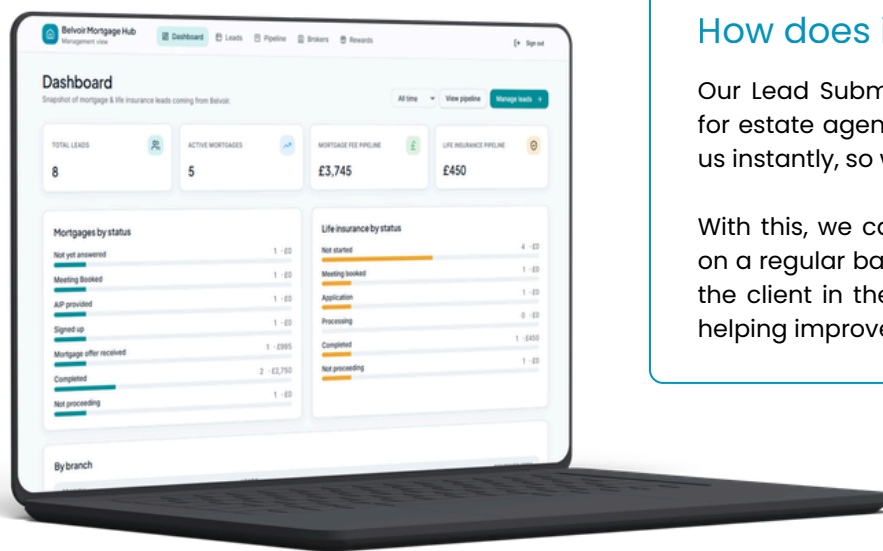


25+ Branches

of estate agencies work with us now

Removing the guesswork

With our new lead tracking platform



How does it work?

Our Lead Submission Platform makes it quick and easy for estate agents to refer clients. Leads come through to us instantly, so we can act fast and keep things moving.

With this, we can track progress and keep you updated on a regular basis, while our automated system supports the client in the background - setting expectations and helping improve conversion rates.

Login as Management or Negotiator

Separate login's keep fee data secure while giving everyone the correct access to the right information.



Our Mortgage & Protection Advisors

We provide independent financial advice delivered by FCA regulated advisers, offering clear and transparent guidance tailored to your goals.



Our Services

Mortgages



First time buyers, Buy-to-let, Limited Company Buy-to-Let, Home Movers, Remortgages, Bridging Loans, Adverse Credit & much more.

Protection



Life Insurance, Critical Illness Cover, Income Protection, Business Insurance, Children's Protection, Home Insurance.

Investments & Retirement Planning



Investment Advice, Portfolio Reviews, ISA Investment, Wealth Management, Bonds, New Pensions, Pension Consolidation, Pension Drawdown.

Wills & Estates Planning



Creating a Will, Updating a Will, Estates Planning, Inheritance Tax Planning, Power of Attorney, Business Succession Planning, Trusts.