

Broker Toolkit

A page full of resources for you and your clients

Broker Toolkit

Back to Home

In this section you can find various documents and video guides that further explain our products and services for your use. In addition you can also download various unbranded client facing documents that can be used to sell the benefits of using your recommended solution - be it Conveyancing, Survey or one of our other products - to your client.

Useful Downloads

Product Videos

Process Videos

Case Studies

Client Facing Documents

Do your clients get into a fluster about buying and selling properties? Perhaps they're not sure about the conveyancing process is? Or, are your clients first-time buyers who might benefit from some handy hints and tips to help them along the way?

We've created a series of client facing documents that will help your clients understand the Conveyancing process, about other products and services, such as Surveys and what they should expect. We even have house moving and first-time buyer checklists.

These documents are unbranded and are designed to help you to add value to the service you provide to your clients. Simply select the colour that will match your brand colours, and download the PDFs you want to use. Feel free to email or print for your clients.

Why not include as part of every client appointment?

Blue

Green

Orange

Purple

Red

Black

Burgundy

Conveyancing? We've Got It Covered

Buy To Let/Second Home Stamp Duty

Buy To Let Fixed Price Remortgage

The Purchase Process

The Remortgage Process

Requests

Your feedback is important to us. Please let us know if there is anything else you'd like to see in your Broker Toolkit by leaving a request below. Thank you.

Cancel

Submit

Frequently Asked Questions

Creating a new quotation

What is the estimated turnaround time for a self-assessment to be completed?

What additional supplements does the £375 fixed price remortgage include that aren't included in the usual fixed price remortgage?

What is the difference between a standard remortgage and a fixed price remortgage?

What is the difference between a single will and a mirror will?

What is the 'Broker Toolkit'?

In this section, you have access to a range of free resources and helpful guides that further explain our products. In addition, you can also download various, unbranded client-facing documents that can be used to sell the benefits of using your recommended solution - be it Conveyancing, Survey or one of our other products - to your client.

Requests & FAQs

On the right, you'll find a request box and our frequently asked question section. If you think there might be more that our portal could offer, we're very open to suggestions; simply use this box to type in your ideas. Our frequently asked questions are very handy to scroll through; if you have any burning questions, you may find the answer already mentioned, which might save you time in calling our staff.

Client-facing documents

Blue

Green

Orange

Purple

Red

Black

Burgundy

Our client-facing documents come in a variety of colours for you to choose your preferred colour - maybe one that matches with your own branding? As you'll see on your dashboard, we have many different documents to go through, all with the client in mind and for you to download to help them understand the processes better.

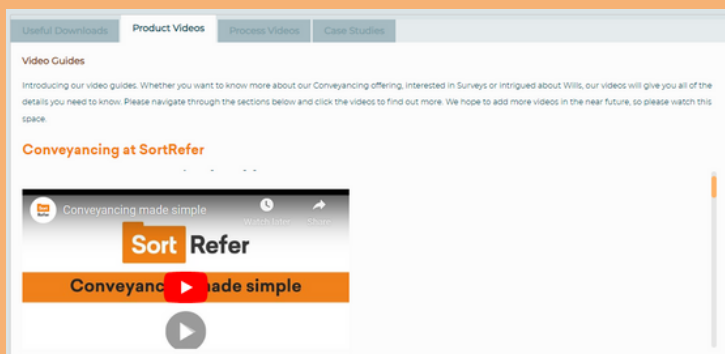
'For your Information'

Just below our client documents, you'll find another section with other various documents to download, including product leaflets - these are more for your benefit.

Product videos

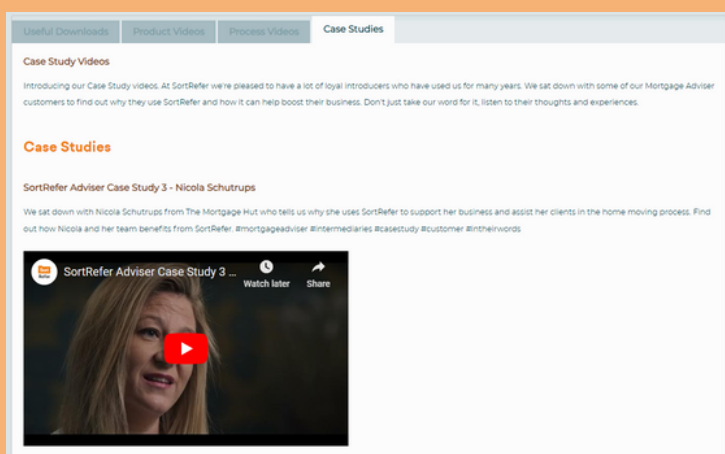
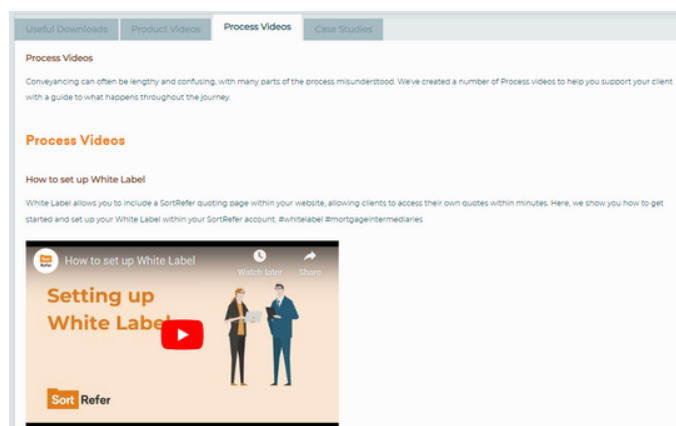
We understand that some people may prefer to watch rather read to take in information...

Our videos give you all of the details you need to know about our range of products. Here, you can click to play the videos to find out more. Alternatively, you can find all our videos on our [YouTube channel](#) here.



Process videos

Conveyancing can often be lengthy and confusing, with many parts of the process misunderstood. We've created a number of process videos to help you support your client with guides explaining what happens throughout the journey. You will also find our guide on setting up White Label in this section for your benefit too.



Case studies

We're very thankful to have introducers be filmed to represent SortRefer.

Their videos can be featured in this section for you to hear why they use our portal and the benefits it has for their firms.

Sign into your account to start using our portal [here!](#)

For more information, please contact our team on:
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