

Broker Toolkit

A page full of resources for you and your clients

Broker Toolkit

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 flutter 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

[Back to Home](#)

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.

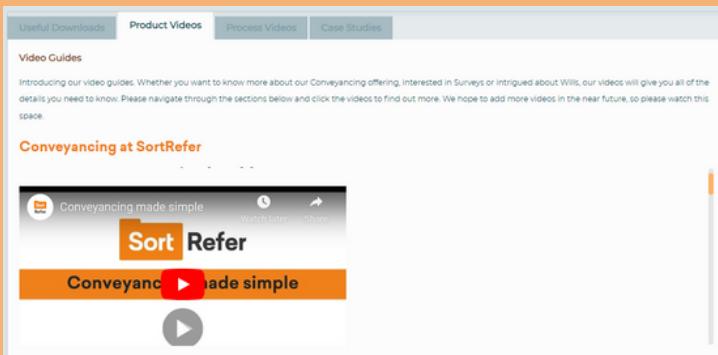
Client-facing documents

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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.



The screenshot shows a navigation bar with tabs: 'Useful Downloads', 'Product Videos' (which is active), 'Process Videos', and 'Case Studies'. Below the tabs is a section titled 'Video Guides' with a sub-section 'Conveyancing at SortRefer'. It features a video player with a play button, a title 'Conveyancing made simple', and a 'Sort Refer' logo. There are also 'Watch later' and 'Share' buttons.

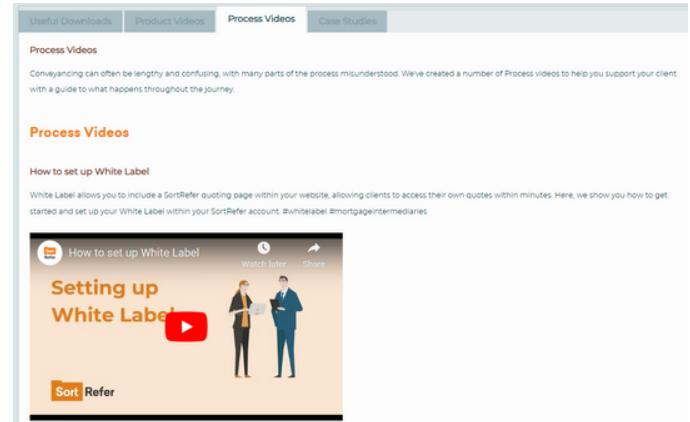
Product videos

We understand that some people may prefer to watch rather than 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.

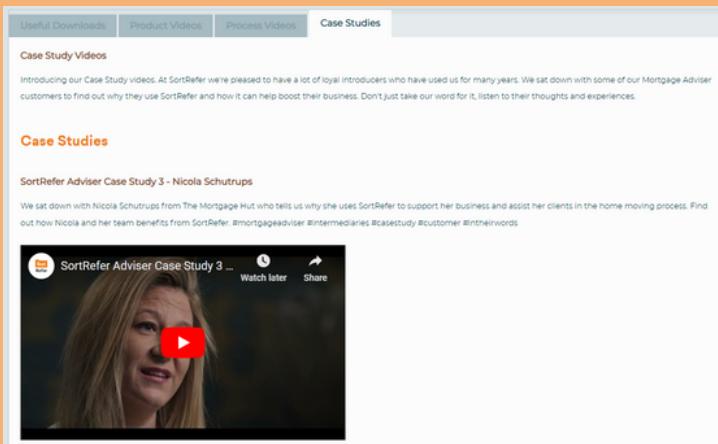


The screenshot shows a navigation bar with tabs: 'Useful Downloads', 'Product Videos' (which is active), 'Process Videos', and 'Case Studies'. Below the tabs is a section titled 'Process Videos' with a sub-section 'How to set up White Label'. It features a video player with a play button, a title 'How to set up White Label', and a 'Sort Refer' logo. There are also 'Watch later' and 'Share' buttons.

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.



The screenshot shows a navigation bar with tabs: 'Useful Downloads', 'Product Videos', 'Process Videos' (which is active), and 'Case Studies'. Below the tabs is a section titled 'Case Study Videos' with a sub-section 'Case Studies'. It features a video player with a play button, a title 'SortRefer Adviser Case Study 3 ...', and a 'Sort Refer' logo. There are also 'Watch later' and 'Share' buttons.

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

For more information,
please contact our team on:
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0333 456 4567