

Stonebridge 



**Join the  
Stonebridge Family**

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# About Stonebridge

Providing award-winning support to mortgage brokers since 1988, Stonebridge's core focus is to help you deliver brilliant service and successfully grow your business. We never forget your individual needs and ambitions, and work closely with you to achieve them. Our success has been built around a flexible proposition, giving real sales development and support to ensure all regulatory requirements are met. Central to this is our wholly-owned 'Revolution' software, which includes a wealth of tools and systems designed to free up your time to focus on giving mortgage advice. Today, Stonebridge is one of the largest independent mortgage and protection networks in the UK, with a professional community of over 1,000 mortgage advisers.



Over 1,000 advisers  
and over 500  
partner firms



£11 billion of  
mortgage lending  
per year



One of the fastest-  
growing networks in  
the UK



150,000 customers  
seen across our  
network per year



**1988**

Stonebridge  
founded



**2014**

Over £1bn  
of mortgage  
lending  
per year



**2015**

SDL Group  
acquires 49%  
stake in  
Stonebridge



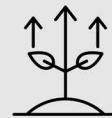
**2018**

SDL Group  
increases  
stake to 100%

BACK  
*each other*

CREATE A   
*better future*

DO THE  
*right thing*



**2019**

£8bn of mortgage lending per year

**2020**

Exceeds over 800 advisers (over 400 firms)

**2021**

10.7bn lending record and winner of four Best Network awards

**2022**

Exceeds 1,000 RIs, £12bn lending record

# The Stonebridge network is like one big family

We believe that our supportive culture and team is what truly sets our business apart from other mortgage networks. Stonebridge has over 100 dedicated employees to ensure that our business partners get the support they need quickly and easily.



"Where Stonebridge differ from other networks is the level of support. The business development managers and their assistants are easy to access. In the compliance department, there is always someone who will talk to you. So if you've got any questions, you don't have to do everything by email. You can just have a quick conversation which makes everything so much easier..."

**Paul Spoelstra, Assured Mortgage Advice**

"To have the support and consistency that Stonebridge is able to give means that, from my business perspective, I've been able to succeed over the last year which I don't know I would've been able to otherwise."

**Rebecca Shuttle, MIMA Mortgage & Protection Advice**



"I haven't got a bad word to say about Stonebridge. They have always been really supportive of me and my business has gone in the right direction. They're always there at the end of the phone. I think that's the most important thing for me. If I am stuck I can ring someone, they can tell me the answer and I can crack on with my job."

**Tom Andrews, Salcey Mortgages**

"I don't consider going anywhere else. The fees are fair. You can talk to the staff and CEO like they are your best friends."

**Matthew Clark, Matt Clark Mortgages Services**



# Mortgage Proposition

Our panel of lenders gives you access to the biggest names in the intermediary mortgage market. With a comprehensive range of mortgage products to meet the needs of your clients – from high street lenders, regional building societies and intermediary-only lenders – we've got it covered. We provide a proposition that delivers real value to our business partners. We work in an open and transparent way:



Proc fees paid  
on exchange



No  
FCA & FSCS  
fees



No  
monthly  
adviser costs



No  
PI insurance  
premiums



No  
complicated  
contracts

## Competitive Lender Fees

We negotiate preferential terms for Stonebridge advisers, which gives you access to some of the most competitive procurement fees in the market.

Payment is made on exchange of contracts and paid directly into your account on a weekly\* basis.



\*In most instances. Enquire for further details on our proc fee payment process.

# Market-leading Technology



Revolution is our all encompassing and complete business solution for mortgage brokers. With full integration for mortgage, protection and GI sourcing referrals, this innovative software system has been developed to enhance all areas of your business.



Lead Generation



Sales Progression



Business Processing



Customer Retention

## Integrated compliance features



121s & CPD



Promotions approvals



Suitability Letters



Compliance Reports



Automated File Checks



Revolution is enhanced and supported by latest Mortgage Brain sourcing technology. You'll have access to the most advanced industry platform, benefit from reduced paperwork and more professional information and illustrations to share quickly and easily with your clients.

# Plus:

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- **RevolutionID:**

Market-leading ID and address-verification technology

- **Marketing support:**

access to marketing materials, brand customisation tools and CRM functionality

- **Online client portal:**

Clients can upload documents, complete Factfind and get sales progression updates

- **Introducer portal:**

Introducers can add clients and get sales progression updates

- **Training and support:**

Telephone support, online help, group training, training videos

- **Customisable dashboards & reports for management information**



# Developing Your Business

We have an experienced team of field based development managers on hand to work closely with you. Our aim is to set, achieve and celebrate goals together. We'll ensure that we fully understand your business needs and agree to a strategy that is specifically tailored to supporting you.



## This includes...

- **Compliance Support** - A dedicated Business Standards Manager and team will help you to manage all aspects of the compliance process.
- **Strategic Planning** - Assistance with setting business objectives and priorities.
- **Generation guidance** on how to expand current lead flow through client referrals and lead purchase.
- **Recruitment assistance** with adviser, management, and support staff recruitment.
- **Sales Development** - Sales process and skills training to maximise lead conversation and case size.
- **Client Bank Management** - Advice on maximising existing client relationship with guidance on marketing material and contact strategies.
- **Business Referral Opportunities** - Facility to introduce leads to other advisers who specialise in areas such as commercial business, wills and trusts, surveying, wealth management, and equity release.



**"We have members who started as lone advisers who are now running firms of ten and doing incredibly well. It's really nice to see and recognise that."**

– Jack Fraser, Senior Business Development Consultant

# Protection Proposition

We believe that protection should be the foundation of all quality financial planning. That's why we've built a proposition that will help you advise with confidence.



## Market Leading Panel

We have a market-leading panel of providers, who are constantly innovating their products and technology. Our providers are easily accessible to provide support with keeping your product knowledge up to speed.



## Solution Builder Technology

Our Revolution system is fully intergrated with iPipeline's Solution Builder technology. This intelligent protection quotes tool will allow you to compare protection products side by side and quickly identify the right solution based on clients needs.



## Business Development Manager Sales & Marketing Support

Stonebridge BDMs are there to help you optimise protection advice. They will be on hand to provide training on the best practice sales process to help you and your advisers maximise opportunities.



## Referral Service

If you prefer to focus on mortgages and refer protection elsewhere, then we can also provide a referral option. Stonebridge Protect takes the risk and burden away from you, by guiding your clients from initial enquiry through to writing the policy in trust.



# General Insurance Proposition

Our GI proposition helps you protect your clients, while enabling you to place business quickly and profitably.

We work with a range of GI providers, all of which provide a comprehensive, quality product with a great claims service.



- Our Revolution system is fully integrated with LV= GI SmartQuote technology. This slick GI quoting system will allow you to source the best GI products for your clients within minutes.
- If you have not arranged GI before, or are keen to expand this area of your business, both the Stonebridge BDM and LV= GI teams will be on hand to support you.





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