

# Example value proposition framework



ADVISER  
INSIGHT

Don't trust Equity Release enough to recommend or refer it for clients

WHAT WE  
OFFER

A specialist equity release referral service

PROPOSITION

**We help you, help your clients unlock their true financial potential**

PERSONALITY

Sage: seek truth and share knowledge

HOW WE  
DO IT

By helping introducers, introduce with ease and confidence

BENEFITS

Help clients

Grow your business

No compliance risk

REASONS TO  
BELEIVE

Education on  
benefits

Support the sale of  
additional residential  
mortgages

Simplicity of a  
referral

Client care

Average £1,600  
commission

Trust Pilot ratings

**moreish**