



## Legal & General Mortgage Club launches Referral Pro tool to help advisers meet individual customer needs

[Legal & General Mortgage Club](#) has announced the launch of its new Referral Pro tool, a referral service that helps advisers meet the needs of their diverse client base, while aligning with Consumer Duty regulations.

The referral tool will greatly expand the range of services advisers can support their customers with, without the need to upskill, while maintaining positive client relationships and ensuring good customer outcomes. The tool provides a range of trusted partners, giving advisers peace of mind.

The wide range of services advisers will be able to refer customers to using the tool include general insurance; protection; wills and trusts; insurance for specialist properties such as HMOs and semi-commercial properties; specialist health insurance; home emergency cover; as well as a broad range of specialist lending areas.

It follows FCA Consumer Duty regulations, which mean that advisers must consider all options for their clients to enable their financial goals, or signpost or refer them to a specialist when they are not able to advise the client directly. Legal & General Mortgage Club's new tool reflects increased interest in more specialist lending and helps advisers refer customers to a wider range of solutions.

### Clare Beardmore, Director of Distribution and Mortgage Club, Legal & General Mortgage Services:

**"In the age of Consumer Duty, it's essential that advisers provide a holistic view of the products and services available to a customer to suit their individual needs. The launch of Referral Pro will help advisers ensure they can refer customers to the solutions they need, should they not be able to advise them directly.**

**"Allowing advisers to say yes to more requests will help drive customer satisfaction and therefore improve client retention rates. We're dedicated to supporting advisers with solutions that help them best serve their customers and look forward to seeing the benefits that Referral Pro can bring."**

## Notes to editors

### About Legal & General

Established in 1836, Legal & General is one of the UK's leading financial services groups and a major global investor, with over £1.2 trillion in total assets under management\* of which 40% is international. We have a unique and highly synergistic business model, which continues to drive strong returns. Legal & General provides powerful asset origination and management capabilities directly to clients, which also underpin our leading retirement and protection solutions. We are a leading international player in Pension Risk Transfer, in UK and US life insurance, and in UK workplace pensions and retirement income. Our purpose is to improve the lives of our customers and create value for our shareholders. Through inclusive capitalism, we are investing in long-term assets, such as real estate and infrastructure, that can help build a better society for the future.

\*At December 2023

### About Legal & General Retail

Legal & General Retail helps create brighter financial futures for all our customers. The division covers the savings, protection and retirement needs of our c.13 million UK and US retail policyholders and workplace members.

In 2022, we had total individual annuity sales of £954 million, and issued £632 million of Lifetime Mortgages and Retirement Interest Only Mortgages. Our Workplace pension platform served 4.9 million members, while our Protection businesses gave peace of mind to more than 6.3 million UK life insurance, 1.8 million group and 1.5 million US customers, taking in £3.1 billion of gross written premiums.

<https://www.legalandgeneral.com/adviser/mortgage-club/>

## Further information

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