

Media Release
17th June 2011

MORTGAGE LINK OFFERS THE ENSURE SOLUTION FOR CLIENTS

Mortgage Link, the national mortgage advisory group, has launched a new model to meet their clients' insurance needs. Rod Templeton, Chief Executive, said the strategy had been worked on by its Board, its licensee business owners and their new alliance partner, Newpark Financial Services, and was launched at the Mortgage Link conference in late May. "We then had a National Day in Auckland where a significant number of our offices attended to hear the standards and processes required to be part of our Ensure solution" said Rod.

"Mortgage Link is very clear its client service is driven firstly, by best meeting client needs, and then by protecting our brand, and lastly by earning appropriate income. The current regulatory environment and our very strong advice process married to the quality of our people and their strong client focus allows us to do all those." said Vicky Devine, Mortgage Link's Business Development Manager. The advice process used by Mortgage Link has been developed in conjunction with Strategi, the financial services industry training organisation, and is built around Disclosure, Client Needs and Fact Find and reporting by way of the Statement of Advice. "Much of the information we need to meet our clients' insurance needs is already captured, and by building in the additional steps to obtain the insurance specific information the client experience becomes seamless" said Vicky. Certainly the Bizware platform used by Mortgage Link, and supported by Finware, is a huge advantage for Mortgage Link advisers in capturing the client information and securing the required processes, according to the Mortgage Link team.

Mortgage Link will require measurable competency for their advisers to be involved, and this will be flexible to build the business as individuals' advisers commitment and experience develops. All advisers will have access to expert needs analysis to meet their clients full needs and this will be managed and monitored by Mortgage Link. Rod Templeton stated "Many in our business, including us, have tried referrals and it often just doesn't work. The big difference with our Ensure solution is each adviser takes responsibility for meeting their client's needs – the client doesn't have to go to a different face or, more importantly, a different brand". However Mortgage Link will continue to accommodate offices where a strong, local referral relationship does work as it means client needs are still being best met.

To assist with this new initiative Mortgage Link has entered into an alliance with Newpark Financial Services, the large national dealer group whose principal focus is on insurance relationships. Andries van Graan, General Manager for Newpark said: "We are very excited about the opportunity to work with Mortgage Link because of the natural fit of the respective businesses. Newpark will support Mortgage Link to develop and implement their Ensure model. We believe there are several areas in our respective businesses that will complement each other and as a result secure significant value for advisers and customers."

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