



**ROSE**  
Financial Planning

## **The Rose Financial Planning Introducer Process - How it Works**

### **Welcome!**

Welcome to RFP's Mortgage Management service. We trust that our working relationship with you proves to be one of if not THE key business partnerships for your business.

As you know, RFP offer an 'Introducer' service to our business partners; that is RFP process the mortgage enquiry and application from start to finish, taking the client through all the relevant processes, from instruction to the finalisation of legal documentation.

RFP's attention to detail and quality of mortgage submissions is highly regarded by the lenders that we do business with.

Our business partners are important to us! We understand your need to be kept informed at all stages. Status updates concerning the mortgage completion and notarisation will be provided enabling you to progress any underlying property completion.

### **How does all this start and what do I do?**

1. We will send you an information pack including our Introducer Agreement and guides. Please complete the agreement and return them to us at your earliest convenience.
2. Once we have received the signed Agreement you can start introducing business to us either online or simply phone us to book an appointment on 0034 677 874 948.
3. Upon receipt of your first enquiry we will allocate an Account Manager.

### **What do RFP need as information and how do I get an enquiry to RFP**

Simply, and as a bare minimum, pass us the client's name, postal address, e-mail address and telephone numbers. We will do the rest!

Of course, we will be happy to have as much detail as possible without you compromising either your own or RFP's position regarding advice.

**Simply call us on 0034 677 874 948  
or e-mail your client's details to [enquiries@rosefp.com](mailto:enquiries@rosefp.com)**