



Legal & General Home Finance announces CII accredited equity release workshops

- The one-day workshops will be run by the Chartered Insurance Institute (CII) and will provide advisers with an overview of the entire syllabus for the CII's Certificate in Equity Release
- Legal & General Home Finance announced a new strategy last year to invest in the intermediated mortgage market and support intermediaries to advise on lifetime mortgages and retirement lending solutions

Legal & General Home Finance has announced it will offer its first new CII-accredited workshops for mortgage intermediaries. The aim of the one-day workshops, which are led by the CII, is to support advisers interested in taking the Level 3 Certificate in Equity Release. The day will give an overview of the syllabus for the qualification and provide vital examination guidance practice. It will cover topics including how to target appropriate customers, key equity release products and the alternatives available to potential clients.

The new workshops follow up on Legal & General Home Finance's announcement last year of a new strategy when it appointed Marie Catch as Head of Mortgage Broker Sales. The retirement lender wants to engage the mortgage intermediary sector, encouraging more brokers to take equity release qualifications and advise their clients on later life lending solutions. Legal & General has previously stated that it is committed to growing the lifetime mortgage market and bringing both the mainstream and retirement lending sectors closer together.

The Level 3 Certificate in Equity Release meets the Financial Conduct Authority's requirement for mortgage advisers and those advising on equity release schemes. At the end of the workshop, candidates should be able to understand: the principles of equity release and the types of schemes available; suitability and affordability of the different types of products; the risks to the consumer; and the application of suitable solutions according to the circumstances of the customer.

"Last year, we announced our new strategy to get more advisers engaged in retirement lending and advising their clients on lifetime mortgages. A key aspect of this plan was our commitment to investing in the intermediated mortgage market. We want to support and guide advisers looking to enter this sector and that includes the use of education and supporting materials."

Retirement lending is a growth market in the UK and there are huge opportunities that we want to help advisers make the most of. In some instances, it can simply be helping intermediaries to take that first step into the market. Our partnership with the CII through these new workshops is just one part of our plan to open up distribution and help the retirement lending sector to reach its full potential. We're confident these sessions will give more advisers the support they want to start their journey into lifetime mortgages."

Marie Catch, Head of Mortgage Broker Sales, Legal & General Home Finance

The workshops will be run by the CII and will take place at Legal & General Home Finance's office at Chadwick House, Solihull on the following dates:

- Wednesday, 23 January 2019
- Wednesday, 20 February 2019
- Wednesday, 20 March 2019

Advisers interested in attending one of the workshops can register [here](#).

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The information contained in this press release is intended solely for journalists and should not be relied upon by private investors or any other persons to make financial decisions.

Notes to Editors

A lifetime mortgage is a loan secured against the client's home. The amount that can be borrowed depends on a client's age, the value and suitability of their home and whether they are applying jointly or as an individual. Dependent on the type of lifetime mortgage chosen, the client receives a cash lump sum, smaller amounts as and when required, or a regular monthly income. Interest is added to the amount they owe each month, which means we charge interest on the loan plus any interest already added. The lifetime mortgage is usually repaid from the sale of the property when the client(s) dies or leaves the property for long term care. There may be cheaper ways to borrow money.

About Legal & General

The Legal & General Group, established in 1836, is one of the UK's leading financial services companies. As at 30 June 2018, we had over 9.5 million customers in the UK for our life assurance, pensions, investments and general insurance plans.

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