

Legal & General integrates One Mortgage System with its SmartrFit platform

- Integration will give OMS users free access to SmartrFit, with no licence fees

25th May 2023, London - [Legal & General Mortgage Services](#) has today announced the full integration of its mortgage research and sourcing platform, [SmartrFit](#), with customer relationship management (CRM) provider, [One Mortgage System](#) (OMS).

Through the integration, OMS broker users will now have free access to the tool and are not subject to any licence fees or contracts. When OMS brokers select SmartrFit as their sourcing provider they can access SmartrFit's forms, which are pre-populated with existing data from within OMS customer records, saving them time that they previously would have spent re-keying data.

The SmartrFit platform provides OMS users with a complete sourcing solution, free of charge, giving them access to criteria, affordability, property check and product sourcing tools. Brokers can easily filter and tailor their search results through the integration and use one or more of the tools in combination when needed.

Search results, and any documents generated from within SmartrFit (for both products and affordability), are also available to view within the OMS system, giving brokers access to full case histories and a single source of truth in one place when advising their clients.

SmartrFit displays results from over 130 lenders, both on and off the high street, along with real-time updates to criteria, pricing and products, which OMS brokers will now benefit from. Brokers can also access regulatory support through the platform, as it gives users the ability to produce and save compliance documents, including the European Standardised Information Sheet (ESIS) and Evidence of Research, to ensure they are meeting industry standards.

Advisers can also join Neal Jannels (Managing Director, OMS) and Joe Wilson (Key Relationship Manager, Mortgage Technology – Legal & General Mortgage Services) on 8th June at 10am to find out more about the integration and the SmartrFit journey. Sign up for the webinar, here: <https://bit.ly/3WqawSY>.

Jodie White, Head of Product & Transformation, Legal & General Technology, comments: “We are delighted to integrate our SmartrFit platform with One Mortgage System and support its brokers with all their product sourcing and research needs.

“Ongoing cost-of-living pressures have meant that brokers are dealing with higher volumes of complex cases, and now that they are able to add expenditure for up to four applicants through SmartrFit, they will be better-placed to overcome this issue and simplify processes. Additionally, SmartrFit can cut [41 minutes per case](#), giving brokers more time back to advise these clients in particularly complex circumstances.”

Neal Jannels, Managing Director, One Mortgage System (OMS), adds: “Our integration with SmartrFit is another way that we’re helping advisers work effectively in our fast-paced market. We hope that the cost and timesaving benefits of SmartrFit will give brokers the tools they need to quickly make the right decisions for their clients.

“We appreciate that there can be obstacles for advisers trying to source the best mortgage for their clients, and with the next Consumer Duty deadline soon approaching, we encourage our users to lean on tools like SmartrFit, and our own CRM system, to do the heavy lifting for them.”

-ENDS-

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 a third is international. We also provide powerful asset origination capabilities. Together, these 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. Through inclusive capitalism, we aim to build a better society by investing in long-term assets that benefit everyone.

**at 31 Dec 2022*

About Legal & General Retail

As of 1st January 2022, Legal & General Retail Retirement and Legal & General Insurance (our two retail businesses) have been combined into one division, Legal & General Retail to enable us to better serve the needs of our retail customers.

Legal & General Retail helps protect lives and futures of our customers; the division covers the savings, protection and retirement needs of our c12 million retail policyholders and workplace members. In 2021, we wrote £957 million of annuity premiums, and issued £848 million of Lifetime Mortgages and Retirement Interest Only Mortgages. Our Workplace pension platform served 4.4 million members, while in the UK we paid out a total of £1,133.8 million in insurance claims.

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

Further information [journalists only]

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