



A partner you and your clients can trust

Why we're a natural
fit when it comes to
client referrals.

We take pride in providing a proactive, prompt and professional service. That means you and your clients have one less thing to worry about during the sale and/or purchase of residential and commercial property.



How we can add value to your business

Your clients trust you to secure the best price for their property. Like you, they want a reliable buyer with the funds in place to move quickly. Our clients look to us to secure the right funding, on the right terms, so that they're in a position to buy. That's why we believe we're a natural fit for your business when it comes to client referrals.

We can support you by:

- qualifying prospective purchasers (identifying those who aren't in a position to buy)
- sourcing great mortgage deals on competitive terms – including complex cases
- finding mortgage deals for purchasers who might otherwise struggle to secure funding
- arranging rapid Decisions in Principle to help speed up decision making
- arranging associated life and general insurances that cover all areas of risk
- keeping all interested parties updated on progress towards the formal mortgage offer
- accelerating your cash flow thanks to quicker, smoother property sales

This means you:

- avoid wasting time and effort on prospective purchasers who wouldn't secure the required funding
- enhance your brand by providing access to a comprehensive and competitive mortgage and insurance service
- focus your energy on what you do best - helping people buy and sell properties
- remove risk by using a compliant client referral process
- remain fully informed to enable continuity of support for clients

Mutual benefits

In order to establish a successful working relationship right from the start, it's important to discuss and agree the nature of our business relationship, how clients can benefit and what we would each want to get out of it.

This would include identifying any training that might be required at the outset, agreeing the process of identifying and introducing potential clients and agreeing how best to keep all parties informed following an introduction.

We can then draw up an introducer agreement and schedule in regular meetings that enable us to review progress and refine the agreement, so that we continue to complement each other's services, for the benefit of clients.

How we'll work



Interview prospective purchasers



Source the most appropriate mortgage deal



Recommend appropriate life and general insurances



Monitor and manage progress



Complete the application paperwork



Manage expectations by keeping all parties informed



Make sure the plans we've recommended remain appropriate over the longer-term

About us

Our advisers have many years' experience in helping people to plan their finances - whether personal or business - and protect the financial security of their families long into the future. We are committed to giving personal, face-to-face and obligation-free financial advice built around their circumstances.

We are also fully qualified, or training towards being fully qualified to give financial advice, holding the full Financial Planning Certificate and Diploma in Financial Planning and/or the relevant mortgage advice qualifications.

The practice represents Openwork. Openwork is a UK-wide network of around 630 financial advice firms. We have access to a range of products from many well-known companies and mortgage lenders.

Our ultimate aim is to create a long-term relationship with all clients, enabling them to plan their finances whatever their requirement. Financial planning is about the life you lead, the choices you make and the people you trust. You can trust us to help clients create the financial future they've always wanted.

Our values

Fair treatment of clients is central to the way we organise our business, and review our performance.

We provide clients with clear information and keep them up-to-date with progress during all work we carry out for them.

We ensure clients know what we are going to do for them and we deliver on our promises.

We make sure clients understand the features and benefits of the plans we've implemented for them.

We ask clients for feedback to ensure we've met the high standards that we measure ourselves against.

Inspiring client confidence

Our combined expertise will reassure your clients that their property transaction and mortgage and insurance needs are being properly looked after by trusted professionals, with their interests at heart.

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