

You can simply *do things better* with the Key

A powerful sales, CRM and case management system for mortgages, insurance, life, loans or other financial products. Compliant audit trails, all client data is backed-up using remote cloud storage, so your data is safe.

Online Client Portal offering seamless digital Fact Find, secure document exchange, messaging and case tracking for you and your clients.



"We use the full functionality of the Key to run our business back office and have now been paperless for over 6 years. This saves us a huge amount of time per case. This has helped increase our turnover year on year."

Mortgage Advice Brokerage,
Glasgow

Full control over the sales process

Proper management of 'what' and 'how' your business operates and sells

Complete compliance control

Set compliance controls at both a company and individual user level

Fees and commission tracking

Input, monitor and reconcile your fees and commission

Configurable to suit your business

Flexibility to adapt to your business's needs and requirements

Work online or offline

Use the system with or without an internet connection

Help and Support

Free webinar training, video tutorials and help guides

Your data backed up on our servers

All your clients' data stored safely in case the unimaginable happens

Online Client Portal with Fact Find

Secure document exchange, messaging and case tracking

Single data entry

You only have to enter your data once saving you time and money

Extensive management reporting

Wide range of reports available to help you manage your business

Unrivalled system integration

Integrated with all Mortgage Brain sourcing and other major systems

Get in touch for more information:

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www.mortgage-brain.co.uk/The-Key