

13<sup>th</sup> May 2021

## **PRIMIS and Eligible ai announce partnership to support AR firms to retain more clients**

[PRIMIS Mortgage Network](#) and Eligible.ai have agreed a new partnership, which gives the network's Appointed Representative (AR) brokers access to Eligible's personalised client engagement platform Retain, designed to help advisers keep clients for life. Members of PRIMIS will have exclusive access to the software as the network looks to provide advisers with the best technology available, to enable them to grow their businesses and retain more clients without the added time and manual intervention.

PRIMIS members who use the network's exclusive in-house customer relationship management (CRM) system, Toolbox, can take advantage of the new integration that plugs straight into Retain and automatically starts communicating with clients as soon as they complete.

Retain supports advisers by automatically educating and keeping in touch with clients throughout their mortgage journey, freeing up advisers' time to focus on advice and submitting business. The system learns about client needs, sending them firm-branded communications relevant to their current situation, notifying advisers when they are ready to talk about their options. This enables advisers to have a real-time view of their entire client base, understanding what clients care about, so they can provide timely advice and support on next steps.

**Vikki Jefferies, Proposition Director at PRIMIS Mortgage Network, commented:** *"Today's partnership with Eligible is another example of our commitment to helping make brokers' lives easier through technology. Tools that save time and drive client retention are an asset to any adviser – particularly those looking to grow their business – and this is exactly what our partnership with Eligible will prove our AR firms with more of. I hope to see brokers embracing the benefits that Eligible's Retain platform can provide them and their business as they continue to provide the best possible customer outcomes."*

**Rameez Zafar, CEO of Eligible, added:** *"We're pleased to partner with PRIMIS, who are committed to ensuring their members have access to the best tools out there to future proof their businesses. Our client retention solution gives advisers time back, allowing them to focus on submitting more business. We look forward to continuing to work with many existing PRIMIS firms who use Retain and getting to know new firms through this invaluable partnership."*

**-ENDS-**

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## **Notes to Editors**

### **About PRIMIS**

[PRIMIS Mortgage Network](#) brings the power of First Complete Ltd, Advance Mortgage Funding Limited and Personal Touch Financial Services Ltd together under one roof so we can provide you with world-class support that is second to none. We are part of the LSL Group and backed by their extensive financial services experience and knowledge we aim to grow not just our Network, but your business as well.

### **About Eligible.ai**

Eligible.ai is an award-winning mortgage software technology firm, established in 2017. Eligible is focused on building personalised relationship solutions for financial services in the mortgage market. Their pilot solution is Retain - a smart client engagement platform designed to help advisers keep clients for life. Eligible is on a mission to help financial services keep clients forever, they work closely within industry to support productivity, save time, and reduce costs and deliver solutions that are product-market fit. They are continuously making improvements to their platform to help streamline and automate the mortgage client lifetime journey and are helping firms make the most out of their most valuable asset, their data. Currently allowing over 700 advisers to have peace of mind that their clients are being taken care of, whilst they can focus solely on advice.

To learn more visit <https://eligible.ai>