

# UINSURE ADVISER PLATFORM

## BUY TO LET REFERRAL GUIDE (SINGLE PROPERTIES ONLY)

This guide explains how mortgage intermediaries can submit a Buy to Let (BTL) referral via the Uinsure Adviser Platform.

### 1.

#### LOG IN TO THE UINSURE INTERMEDIARY WEBSITE

Log into the Uinsure Intermediary portal using your usual credentials.

### 2.

#### GO TO “REFER A CLIENT”

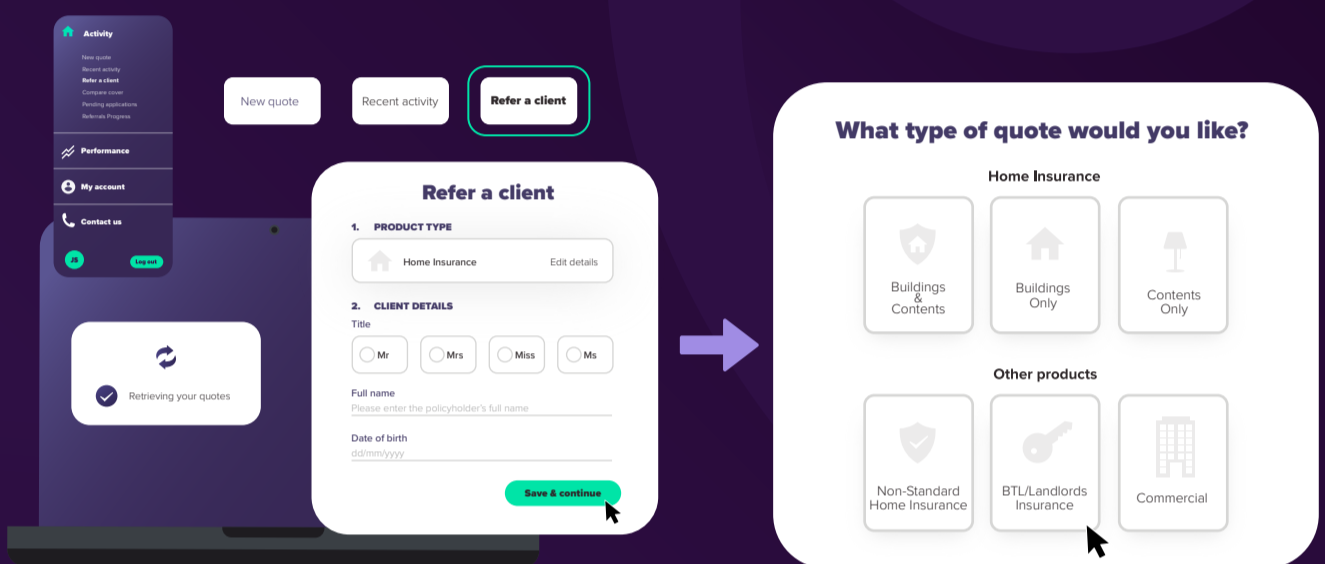
Select the *“Refer a Client”* tab from the main navigation menu.

### 3.

#### CHOOSE PRODUCT TYPE – BTL/LANDLORDS

You will see several product types. Select *“BTL/Landlords”* to begin your Buy to Let referral - (for HMO/Portfolios/Blocks of Flats please use Commercial).

Click *“Save & Continue”* to move forward.



### 4.

#### ENTER CLIENT DETAILS

Complete the Client Details section, including:

- Client Name
- Date of Birth

Click *“Save & Continue”* to move forward.

### 5.

#### ENTER PERSON TO CONTACT INFORMATION

Provide details for the person Uinsure will contact:

- Telephone Number
- Email Address

### 6.

#### SELECT CALLBACK DATE AND TIME

Choose a callback date/time (ideally within the next 7 days) that suits the client.

Click *“Save & Continue”* to move forward.

### 7.

#### PROVIDE QUOTE DETAILS

Complete the Quote Details section:

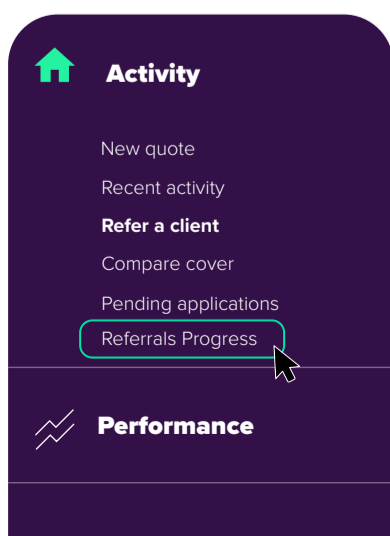
- Address to be insured
- Type of customer (select from dropdown)
- Any additional referral notes

### 8.

#### SUBMIT THE REFERRAL

Click *“Send Referral”* to submit the client details to Uinsure’s referral team.

All updates can be seen via the *“Referral Progress”* tab on the left-hand side of the website:



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