



**TECHNOLOGY THAT  
MAKES ADVICE**

**FLOW**



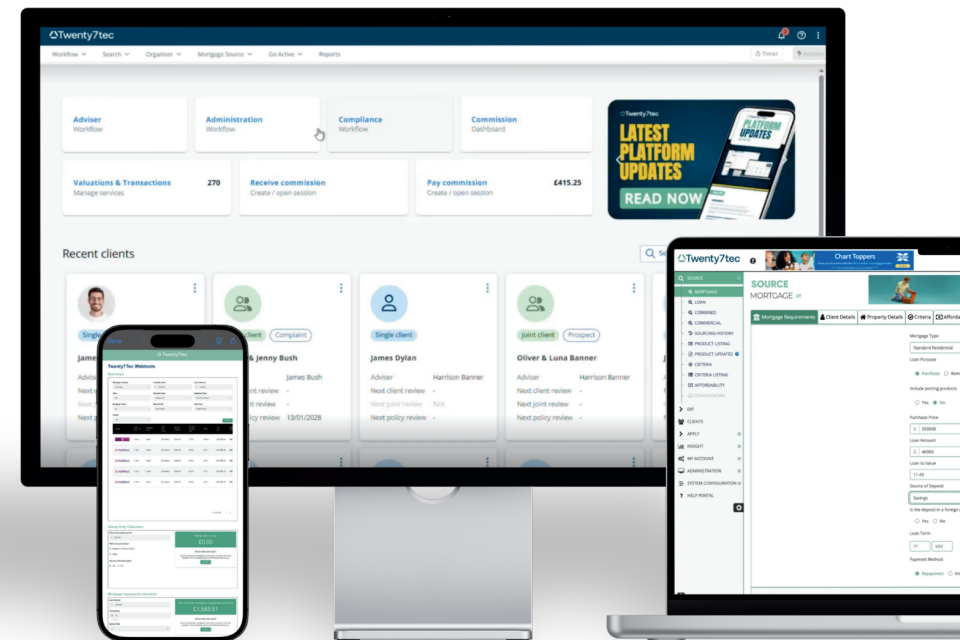
Twenty7tec is the trusted ecosystem powering how financial services businesses are designed, operated and digitally enabled.

In an AI-powered world, we help financial services firms configure their entire digital operating model - from client engagement and advice delivery to product selection and reporting - so their technology works the way their business works.

No disconnected systems. No re-keying. No rigid processes. Just one configurable ecosystem built around control, connection, compliance and growth.

### Our belief

Firms should define how they operate.  
Technology should adapt to them.



# RESEARCH

Mortgage product sourcing

## Product overview

Trusted by over 15,000 mortgage advisers every day, RESEARCH is the mortgage sourcing system from Twenty7tec that gives advisers control over the product selection and application process.

## The value to advice firms

- Customise your research around the needs of the client
- Refine and compare with precision, narrowing options effectively
- Model and compare mortgage scenarios instantly
- Consider and compare the alternatives to deliver focused recommendations

## Key features & benefits

Start the journey in product, criteria or affordability

Apply role-based controls to define organisational permissions

Use tailored filtering, near-miss tolerances and true cost preferences

Two-way open API connecting mortgage sourcing to client workflows

Multi-product sourcing including bridging and equity release

ADAPT provides configurable alerts for when the market shifts

One-click compliant comparison exports

Avoid rekeying and apply directly to your chosen lender with APPLY

The screenshot displays the 'SOURCE MORTGAGE' interface within the Twenty7tec system. The left sidebar contains a navigation menu with options like MORTGAGE, LOAN, COMBINED, COMMERCIAL, SOURCING HISTORY, PRODUCT LISTING, PRODUCT UPDATES, CRITERIA, CRITERIA LISTING, AFFORDABILITY, and CONVEYANCING. The main area is titled 'MORTGAGE' and includes tabs for Mortgage Requirements, Client Details, Property Details, Criteria, Affordability, and Filters. The form fields include:
 

- Mortgage Type: Standard Residential (dropdown)
- Loan Purpose: Purchase (selected), Remortgage
- Include porting products: Yes (selected), No
- Purchase Price: £ 350000
- Loan Amount: £ 40000
- Loan to Value: 11.43
- Source of Deposit: Savings (dropdown)
- Is the deposit in a foreign currency: Yes, No
- Loan Term: YY, MM
- Payment Method: Repayment (selected), Interest Only, Part and Part / Split

 The interface also features a 'National Friendly' logo and a 'True Cost & Fee Details' button in the top right corner.

*"We've gone from rekeying data to doing everything once. That saves time, reduces risk and gives us more confidence. It lets our teams focus on what matters most - helping people secure their homes."*

**Andy Oldham,**  
Chief Executive, Mojo Mortgages

# ADVICE FOR MORTGAGE & PROTECTION

Operating system for mortgage advice

## Product overview

ADVICE is the API-first digital command centre for mortgage and protection advice firms - connecting frictionless client onboarding, customisable advisor workflows, compliance tooling, deep third-party integrations, commission reconciliation and impactful reporting.

## The value to advice firms

- Deliver the right advice, your way
- Build compliance into every case
- Connect your mortgage ecosystem
- Control complex revenue and commission

## Key features & benefits

End-to-end mortgage and protection workflow configuration

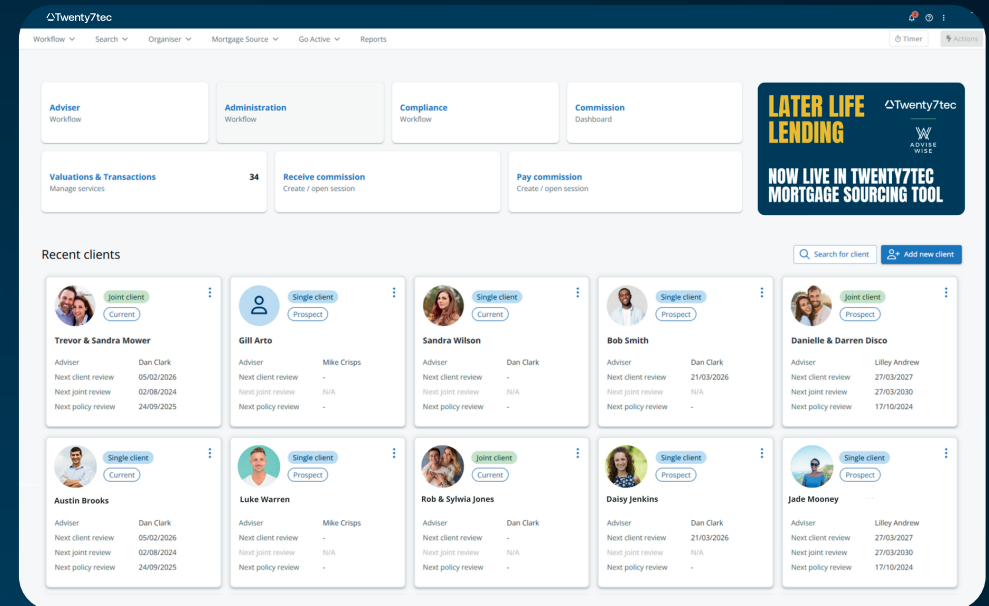
Case and pipeline management

Configurable document management & reporting

Integrated sourcing and application journeys

Client journey and communication tracking

Management reporting and oversight



"Our whole ethos is about building relationships, and the Twenty7tec system allows us to do that efficiently while keeping a personal touch. It's much easier to keep an existing client than to find a new one, and these reports ensure we're always there for them at the right time."

**Roxy Hull, Mortgage Adviser, Premier Plus**

**12,800**

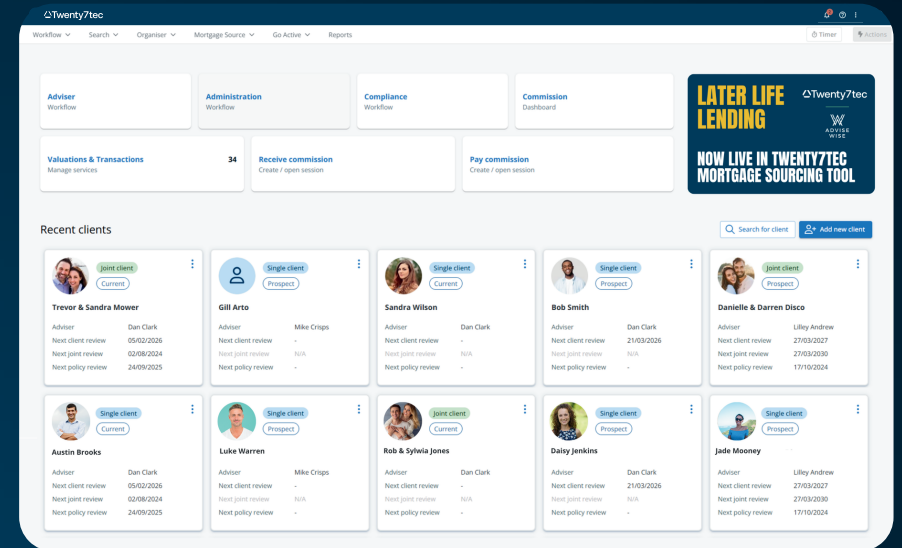
Mortgage Cases are created by our CRM users in an average month.

# ADVICE FOR WEALTH

Operating system for wealth advice

## Product overview

ADVICE is the API first digital command centre for IFA practises – connecting frictionless client onboarding, customisable adviser workflows, compliance tooling, deep third-party integrations, commission reconciliation and impactful reporting.



## The value to advice firms

- Deliver the right advice, your way
- Build compliance into every case
- Integrate the tools and data your advisers rely on
- Control complex revenue and commission

Firms such as First Financial are saving up to £90,000 per year thanks to compliance and adviser management efficiency savings with ADVICE

### Key stat

## Key features & benefits

Configure workflows, portfolio setup, review cycles and ongoing servicing workflows

Access live fund pricing, valuations and performance data within client records

Link client policies to providers for a complete, up-to-date view between reviews.

Automated review management to support consistent client engagement

Management reporting and oversight across adviser activity and performance

Through our open integrations, connect your preferred third-party services

*"Twenty7tec doesn't just provide a CRM; it provides an efficiency ecosystem. Whether it's automating our compliance checks and workflows or launching a marketing campaign to 19,000 clients in five minutes, the platform allows us to operate with the speed and sophistication of a much larger firm while keeping our overheads lean."*

**Katie Badiani**  
Compliance Manager,  
First Financial

# CONNECT

B2C digital tools & APIs

## Product overview

CONNECT is the lead-generation layer for advice firms - designed to solve one of the industry's biggest challenges: finding your next customer. These simple, yet smart, webtools enable your next customer to engage with you online and flow seamlessly into the advice journey.

**CONNECT links directly into ADVICE, STEPPL and RESEARCH for a connected journey.**

## The value to advice firms

- Capture demand at the start of the journey
- Pre-qualify clients before they reach your team
- Convert engagement into real opportunities
- Launch quickly with controlled, scalable deployment aligned to your digital strategy.

## Key features & benefits

Configurable web tools for affordability checks and lead capture

Real-time product data powered by RESEARCH APIs to ensure accurate output

Flexible branding, product visibility and display configuration

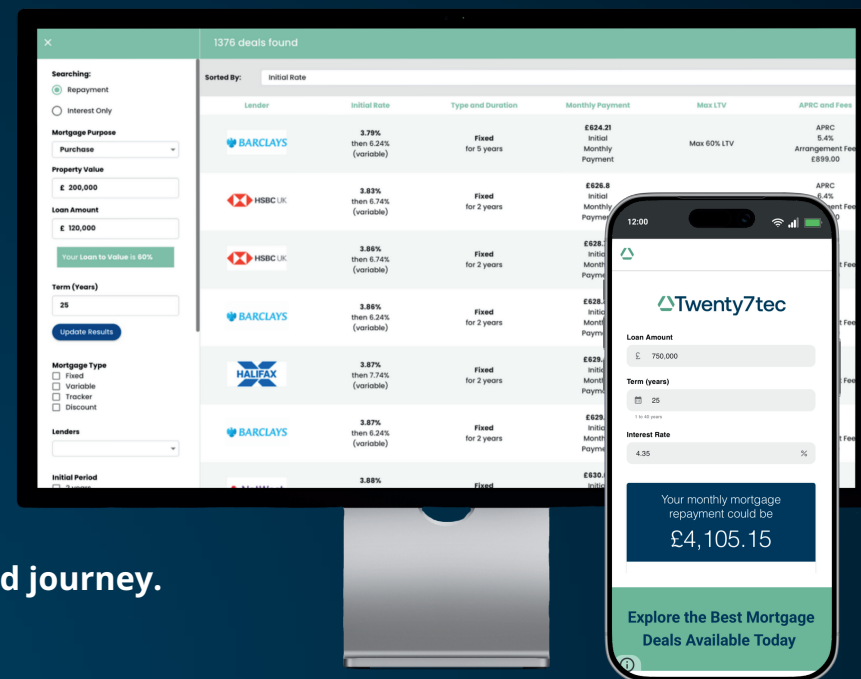
Centralised logic updates without requiring costly development

Embedded lead capture with structured enquiry creation

Seamless ADVICE CRM integration with no rekeying

Scalable deployment for firms, networks and partners

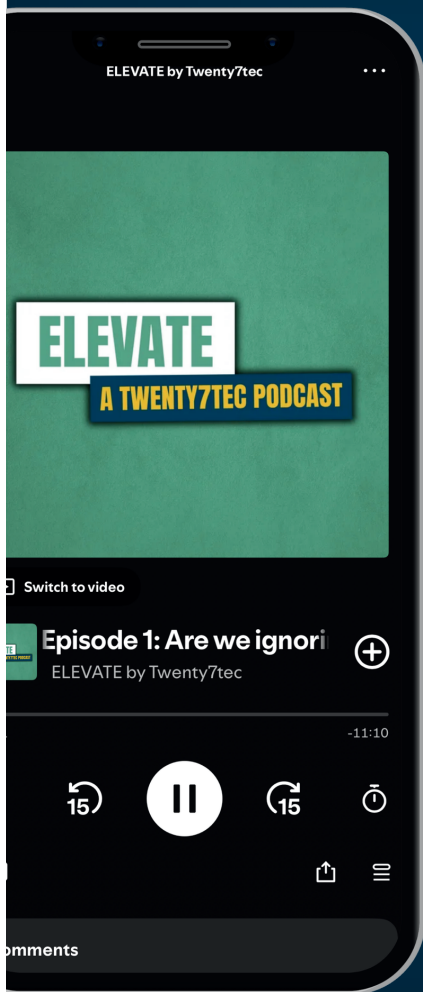
Mobile-optimised experiences built for modern client behaviour



Create a **digital shop window** and convert **interest** into **opportunity** with **easy-to-embed** web tools

# ELEVATE

A TWENTY7TEC PODCAST



Watch now on



More episodes  
coming soon!

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# MONTHLY MORTGAGE MARKET SNAPSHOT

FREE!



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EDITION  
AVAILABLE  
TO  
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To find out more about Twenty7tec and our product range, have a chat with our team.

