



Tech Enablement for Trusted Advisers

02 April 2021 By: Austin Kilgore

Digital originations help lenders engage with consumers earlier in the process of buying homes and cars. But even the most sophisticated lenders often struggle with extending these enhancements to professionals outside their organizations who are integral to large financial transactions. That's finally starting to change, with lenders and trusted advisers leveraging new collaboration tools and strategies for the combined benefit of their shared consumer client.

Key questions discussed in this report:

- What causes friction between financial institutions and trusted advisers?
- How can lenders and trusted advisers work more collaboratively for the combined benefit of their shared consumer clients?
- What operational strategies and technology are needed to implement these approaches?

Companies Mentioned: Better Mortgage, Blend, Guaranteed Rate Affinity, Realogy, Rocket Mortgage

Consumer data in this report was collected via an online survey fielded in April 2020, consisting of 1,000 consumers who obtained at least one mortgage or auto loan or lease on or after January 2018.

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