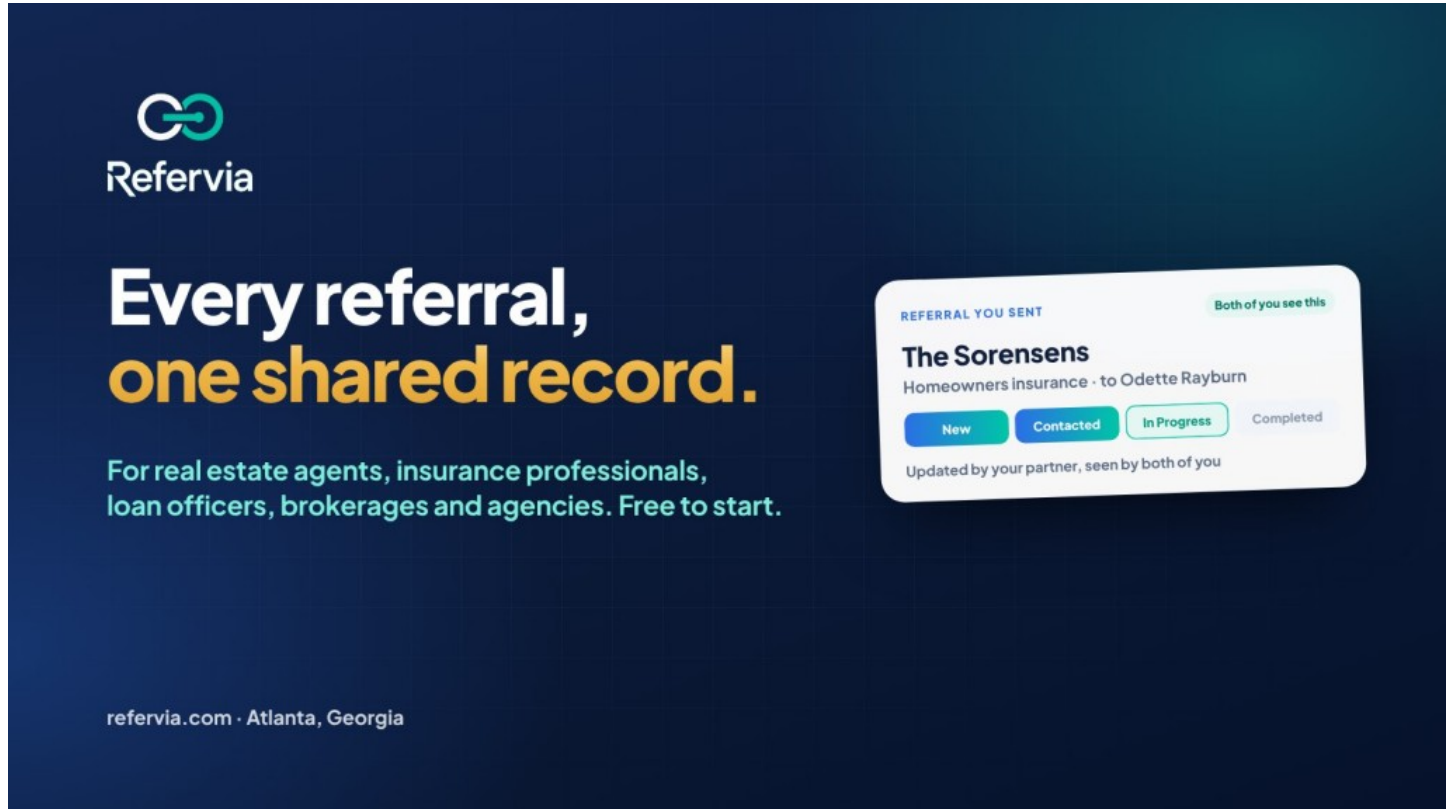


Refervia Launches Referral Handoff Platform for Real Estate, Insurance and Mortgage Pros

The new referral handoff platform gives both sides of every referral one shared record, from the first introduction to the closing. Free to start.



The graphic features the Refervia logo (a stylized infinity symbol) and the text "Every referral, one shared record." in large, bold letters. Below this, it states "For real estate agents, insurance professionals, loan officers, brokerages and agencies. Free to start." At the bottom left, it says "refervia.com · Atlanta, Georgia". On the right side, there is a screenshot of the Refervia app interface showing a referral for "The Sorensens" (Homeowners insurance) sent to Odette Rayburn. The interface includes a progress bar with stages: New, Contacted, In Progress, and Completed. The "In Progress" stage is currently active. A note at the bottom of the screenshot says "Updated by your partner, seen by both of you".

Atlanta, Georgia Oct 30, 2026 ([IssueWire.com](https://www.issuewire.com)) - Every referral begins with trust. A real estate agent hands her buyers to an insurance agent she believes in. A loan officer sends a young family to the agent who will look after them. And then, too often, the trail goes quiet. Today Refervia, an Atlanta company founded by insurance professional Perry Burton, announced the launch of its referral handoff platform for the professionals whose businesses run on trusted introductions: real estate agents, insurance professionals, loan officers, brokerages and agencies.

Referrals are the backbone of these businesses. The typical Realtor earns 21 percent of their business through referrals from past clients, and another 20 percent from repeat clients, according to the National Association of REALTORS® 2025 Member Profile. Forty-three percent of recent home buyers found their agent through a friend, neighbor or relative, according to NAR's 2025 Profile of Home Buyers and Sellers. In insurance, 58 percent of the policyholders in Vertafore's 2025 survey were referred to their independent agent by family or friends.

Yet the handoff itself still lives in text threads, voicemails and memory. Each professional's CRM holds only its own half of the story: the sender's record ends at "referred out," and the receiver's begins as a new lead. Whether the client was reached, where things stand and how it ended often reach the person who made the introduction weeks later, by chance, or never.

"A referral is someone's trust, passed from one hand to another," said Perry Burton, founder of Refervia. "In insurance, I watched good referrals slip away in text messages and missed calls. Everyone involved cared. Nobody could see what happened next. Refervia gives the person who sent the client, the person who received them, and the client the same picture at the same time. When a handoff is handled well, everyone's reputation grows."

With Refervia, a professional sends a referral from their Referral Desk to a Trusted Partner they've invited, with the client's details and the client's OK attached. From that moment, both of them watch the same live status move from New to Contacted to In Progress to Completed. On Pro plans and up, Refervia follows up on its own: if a referral is still New after 24 hours, the partner gets a reminder, and at 48 hours the sender hears "No contact yet," with one step to send the client to someone else. A private client status link lets the client see where things stand without picking up the phone.

Refervia also brings a Partner Network for finding new partners, with a Refervia Verified badge for professionals whose license has been checked; the Refervia Line, a dedicated phone number on Pro plans and up that turns a partner's call into a referral on the desk; and, for brokerages and agencies, a Team Referral Queue that hands each incoming referral to the first teammate free to take it.

Refervia works alongside the CRM a professional already pays for. New referrals flow into it through Zapier or a CSV export, and every referral and partner relationship stays the member's to take anywhere. Refervia charges no per-referral fees and never charges, collects or splits referral fees. It is not a lead marketplace: members bring the partners they already trust, and grow from there.

"Georgia runs on relationships, so that's where we're starting," Burton said. "If you've ever sent a client to someone you trust and then spent weeks wondering whether they called, Refervia was built for you."

Refervia is available now at refervia.com. Every account type starts on a Free plan with no credit card required, and the referrals a member receives are never capped on any plan. Pro is \$49 a month and Pro Max is \$89 a month, each with a 30-day free trial. Team plans for brokerages and agencies start at \$199 a month, with a 14-day free trial.

About Refervia: Refervia is a referral handoff platform for real estate agents, insurance professionals, loan officers, brokerages and agencies. It gives both sides of every referral one shared record, live status and automatic follow-up, so trusted handoffs stay organized from the first introduction to the closing. Refervia works alongside the CRM professionals already use and never charges, collects or splits referral fees. Refervia LLC is based in Atlanta, Georgia. Learn more at refervia.com.

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