

INTRODUCER CONTACT INFORMATION FORM

Date

Company Details

Introducer Name/Business Name

ABN

Year Established

Email

Location Address

Suburb/Town

State

Postcode

Postal Address if different from above

Suburb/Town

State

Postcode

Phone

Fax

Services Offered

Introducer Type

 Home Loans

 Private Funds

 Business Finance

 Financial Planning

 Equipment & Vehicle Finance

 Other

Aggregator

Aggregator Membership Number

States of Operation

 NSW

 WA

 VIC

 NT

 QLD

 ACT

 SA

 TAS
Comments/Notes

Industry Memberships

 MFAA

 Other

 FBAA

 None Held
If Other, Please list

Please provide details of primary and additional contacts in your organisation.

This will allow us to identify individuals for handling of confidential information, record correct phone, mobile and email details and add them to our regular information and interest rate updates, if they wish.

Principal Contact Details

Title	First Name	Surname	Preferred Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Position		Email	
<input type="text"/>		<input type="text"/>	
Location Address if not main office address			
<input type="text"/>			
<input type="text"/>			
Suburb/Town	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Phone	Fax		Mobile
<input type="text"/>	<input type="text"/>		<input type="text"/>
Number of years of experience in the Industry			<input type="text"/>
Do you wish to receive news and interest rate updates by email from Think Tank?			<input type="checkbox"/>
What is your preferred method of contact			<input type="text"/>

Administrative Contact Details

Is this person authorised to send/receive confidential client information?

Yes

No

If authorised, would you like to receive a certificate of accreditation?

Title	First Name	Surname	Preferred Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Position		Email	
<input type="text"/>		<input type="text"/>	
Location Address if not main office address			
<input type="text"/>			
<input type="text"/>			
Suburb/Town	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Phone	Fax		Mobile
<input type="text"/>	<input type="text"/>		<input type="text"/>
Number of years of experience in the Industry			<input type="text"/>
Do you wish to receive news and interest rate updates by email from Think Tank?			<input type="checkbox"/>
What is your preferred method of contact			<input type="text"/>

**Additional Consultant/
Broker Contact Details**
(for employees & contractors
within your firm)

Is this person authorised to
send/receive confidential
client information? Yes
No

If authorised, would you like
to receive a certificate of
accreditation?

Title First Name Surname Preferred Name

Position Email

Location Address if not main office address

Suburb/Town State Postcode

Phone Fax Mobile

Number of years of experience in the Industry

Do you wish to receive news and interest rate updates by email from Think Tank?

What is your preferred method of contact

Affiliated Introducer Details
(For other introducer firms associated
with your business)

Is this person authorised to
send/receive confidential
client information? Yes
No

If authorised, would you like
to receive a certificate of
accreditation?

Title First Name Surname Preferred Name

Name of Company / Business

Position Email

Location Address if not main office address

Suburb/Town State Postcode

Postal address (if different from Above)

Suburb/Town State Postcode

Phone Fax Mobile

Number of years of experience in the Industry

Do you wish to receive news and interest rate updates by email from Think Tank?

What is your preferred method of contact