

Date

**INTRODUCER CONTACT INFORMATION FORM**

**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 

 Are you affiliated with an aggregator?  
if Yes please provide details

**States of Operation**

 NSW  WA 

 VIC  NT 

 QLD  ACT 

 SA  TAS 

Comments/Notes

**Industry Memberships**

 MFAA  Other 

 FBAA  None Held 

If Other, Please list

**Supporting Documents**

 (Please provide copies/certificates of  
currency of the following or submit later  
with signed Introducer Agreement)

Professional Indemnity Insurance

Attached Comments/Notes

Industry Memberships



Drivers Licence/Passport of Principal



 Above copies will be attached to the executed Introducer Agreement 
**Bank Details**

(For payment of Commissions)

Account Name

BSB

Account Number

email for RCTI's, Commissions, remittance, etc

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

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"/>

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

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

**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