

Thinktank contact

Date

Introducer details

Introducer name	Aggregator
Introducer firm	Introducer ABN
Phone/ mobile	ACL/ ACR
Email address	Accredited with Thinktank? <input type="checkbox"/> Yes <input type="checkbox"/> No

Application details

Borrower name/s					
Loan amount	\$			Settlement date	
Type of loan		LVR	Line of credit portion	Loan options	
Full Doc	<input type="checkbox"/>	%	\$	Lease Doc	<input type="checkbox"/> Conditions apply
Mid Doc	<input type="checkbox"/>	%	\$	Flexi loan	<input type="checkbox"/> Conditions apply
Quick Doc	<input type="checkbox"/>	%	\$	GST loan	<input type="checkbox"/> Conditions apply
SMSF loan	<input type="checkbox"/>	%		Top Up loan	<input type="checkbox"/> Conditions apply

Introducer fee arrangements (before GST)

Did you know Thinktank donates \$100 from every loan settled to charities nominated by our team?

Commercial

Establishment fee and upfront commission	<input type="checkbox"/> Option 1	0.95% (0.60% broker / 0.35% TT) Insert preferred upfront (max 1.0%)	%
	<input type="checkbox"/> Option 2 Note: \$20 monthly loan fee applies	0.75% (0.60% broker / 0.15% TT) Insert lower commission if preferred	%
	<input type="checkbox"/> Option 3	1.35% (1.0% broker/ 0.35% TT) *Non-SMSF commercial only	%
		Top up loan upfront (max 1.0%)	%

SMSF

SMSF residential (fixed \$650 +GST)	<input type="checkbox"/> (0.50% upfront included)
SMSF Commercial upfront 0.95%	<input type="checkbox"/> (0.60% broker / 0.35% TT) <input type="checkbox"/> (upfront (max 1.0%) which will increase the establishment fee)

Residential

Residential loans (fixed \$650 +GST)	<input type="checkbox"/> (0.60% upfront included)	Deduct \$100 and donate to:	
		<input type="checkbox"/> Good Return <input type="checkbox"/> Salvation Army <input type="checkbox"/> Beyond Blue <input type="checkbox"/> Mediciens sans Frontieres	<input type="checkbox"/> Smith Family <input type="checkbox"/> RSPCA <input type="checkbox"/> Starlight Foundation

Trail comissions

Commercial	<input type="checkbox"/> Standard trail 0.25% included in rate (standard trail will apply if left blank)
	% <input type="checkbox"/> Max 0.50% on all Commercial and Commercial SMSF loans
Residential SMSF	<input type="checkbox"/> Standard trail 0.25% included in rate
Residential investors and owner occupiers	<input type="checkbox"/> Standard trail 0.20% included in rate (standard trail will apply if left blank)
Separate mandate for collection at settlement	
Note: signed mandate from client must be submitted with the loan application	% OR , Fixed \$

Letter of Offer instructions

<input type="checkbox"/> Please send direct to me as the broker	<input type="checkbox"/> Please send direct to the Applicant
Other	

Application submission checklist

<input type="checkbox"/> Loan application form	FULL DOC	<input type="checkbox"/> Tax returns: company/ business/ personal
<input type="checkbox"/> Borrower identification (AML compliant)		<input type="checkbox"/> PAYG income confirmation/ payslips
<input type="checkbox"/> Signed privacy consent/s	LEASE DOC	<input type="checkbox"/> Income Self Certification
<input type="checkbox"/> Current ATO portals for all trading and asset providing entities	MID DOC	<input type="checkbox"/> Income Self Certification, AND:
<input type="checkbox"/> Current loan statements (refinance)		<input type="checkbox"/> Last 2 BAS statements, OR
<input type="checkbox"/> Copies of lease/s (investment/Lease Doc)		<input type="checkbox"/> Last 3-6 months trading statements, OR
<input type="checkbox"/> Contract of sale (purchase)		<input type="checkbox"/> Accountant's letter
<input type="checkbox"/> Evidence of funds to complete (purchase)	QUICK DOC	<input type="checkbox"/> Income Self Certification
<input type="checkbox"/> Minimum 6 months bank statements	SMSF LOAN	<input type="checkbox"/> Refer specific SMSF Loan checklist
	RESIDENTIAL	<input type="checkbox"/> NCCP addendum is completed and signed
<input type="checkbox"/> Broker to sign: I confirm all details are correct, including commissions.		
Signature	Date	