

Introducer Cover Page

Thinktank contact Date

Introducer details

Introducer name Aggregator
 Introducer firm ACL/ ACR
 Phone/ mobile Direct Accreditation with Thinktank? Yes No
 Email address If yes, please provide ABN

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	Zero fee <input type="checkbox"/> (3yr - 0.5% loading to interest rate) <input type="checkbox"/> (5yr - 0.3% loading to interest rate) No valuation, legal, title insurance, settlement or establishment fees to pay Available on all loan types except for SMSF-LRBA's and NCCP loans	
	<input type="checkbox"/> Option 4	Other as agreed with Relationship Manager (name)	%

Top Up

Top up loan upfront max 0.5% (0.3% broker / 0.2% TT)

SMSF

SMSF Residential (fixed \$650 +GST)	<input type="checkbox"/> (0.50% upfront included)
SMSF Commercial establishment fee and upfront commission	<input type="checkbox"/> Option 1 <input type="checkbox"/> 0.95% (0.60% broker / 0.35% TT) <input type="checkbox"/> Option 2 <input type="checkbox"/> Other as agreed with your RM (name)

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"/> Smith Family <input type="checkbox"/> Salvation Army <input type="checkbox"/> RSPCA <input type="checkbox"/> Beyond Blue <input type="checkbox"/> Starlight Foundation <input type="checkbox"/> Mediciens sans Frontieres
--------------------------------------	---	---

Trail commissions

Commercial	<input type="checkbox"/> Standard trail 0.25% included in rate	
	% <input type="checkbox"/> Alternate trail as authorised by RM which will change the interest rate	(name)
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	
Separate mandate for collection at settlement Note: signed mandate from client must be submitted with the loan application	% OR , Fixed \$	

Letter of Offer instructions

- Please send direct to me as the broker Please send direct to the Applicant

Other

Application submission checklist

<input type="checkbox"/> Completed loan application form for each borrower and guarantor	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"/> Separate Income Self Certification for each borrower and guarantor
<input type="checkbox"/> Current ATO portals for all trading and asset providing entities	MID DOC	<input type="checkbox"/> Separate Income Self Certification for each borrower and guarantor, PLUS:
<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, OR
<input type="checkbox"/> Evidence of funds to complete (purchase)		<input type="checkbox"/> 1 year tax returns & NOA, OR
<input type="checkbox"/> Minimum 6 months bank statements		<input type="checkbox"/> 1 year financial statements, OR
		<input type="checkbox"/> 1 year tax returns & NOA and 1 year financial statement
	QUICK DOC	<input type="checkbox"/> Separate Income Self Certification for each borrower and guarantor
	SMSF LOAN	<input type="checkbox"/> Refer specific SMSF Loan checklist
	RESIDENTIAL	<input type="checkbox"/> NCCP addendum is completed and signed

Broker to sign: I confirm all details are correct, including commissions.

Signature

Date