

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	
<b>Type of loan</b>		<b>LVR</b>	<b>Line of credit portion</b>	<b>Loan options</b>	
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"/> <b>Option 1</b>	0.95% (0.60% broker / 0.35% TT) Insert preferred upfront (max 1.0%)	%
	<input type="checkbox"/> <b>Option 2</b> Note: \$20 monthly loan fee applies	0.75% (0.60% broker / 0.15% TT) Insert lower commission if preferred	%
	<input type="checkbox"/> <b>Option 3</b>	<b>Zero fee</b> No valuation, legal, title insurance or establishment fees to pay Available on all loan types except for SMSF-LRBA's and NCCP loans	
	<input type="checkbox"/> <b>Option 4</b>	Other as agreed with Relationship Manager (name) Top up loan upfront (max 1.0%)	%

**SMSF**

SMSF Residential (fixed \$650 +GST)	<input type="checkbox"/> (0.50% upfront included)
SMSF Commercial establishment fee and upfront commission	<input type="checkbox"/> 0.95% (0.60% broker / 0.35% TT)
	<input type="checkbox"/> Other as agreed with your RM (name) which will increase the establishment fee. Top up loan upfront (max 1.0%)

**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 commissions

<b>Commercial</b>	<input type="checkbox"/> Standard trail 0.25% included in rate (standard trail will apply if left blank)
	% <input type="checkbox"/> Alternate trail as authorised by RM (name)
<b>Residential SMSF</b>	<input type="checkbox"/> Standard trail 0.25% included in rate (standard trail will apply if left blank)
<b>Residential investors and owner occupiers</b>	<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	% <b>OR</b> , 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"/> Completed loan application form for each borrower and guarantor	<b>FULL DOC</b>	<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	<b>LEASE DOC</b>	<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	<b>MID DOC</b>	<input type="checkbox"/> Separate Income Self Certification for each borrower and guarantor, <b>AND:</b>
<input type="checkbox"/> Current loan statements (refinance)		<input type="checkbox"/> Last 2 BAS statements, <b>OR</b>
<input type="checkbox"/> Copies of lease/s (investment/Lease Doc)		<input type="checkbox"/> Last 3-6 months trading statements, <b>OR</b>
<input type="checkbox"/> Contract of sale (purchase)		<input type="checkbox"/> Accountant's letter
<input type="checkbox"/> Evidence of funds to complete (purchase)	<b>QUICK DOC</b>	<input type="checkbox"/> Separate Income Self Certification for each borrower and guarantor
<input type="checkbox"/> Minimum 6 months bank statements	<b>SMSF LOAN</b>	<input type="checkbox"/> Refer specific SMSF Loan checklist
	<b>RESIDENTIAL</b>	<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	