

# 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"/> <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>	Other as agreed with Relationship Manager (name)	%

### Loan Increases

Loan increase upfront max 0.5% (0.3% broker / 0.2% TT)

### SMSF

SMSF Residential (fixed \$650 +GST)	<input type="checkbox"/> <b>0.60% upfront included</b>
SMSF Commercial establishment fee and upfront commission	<input type="checkbox"/> <b>Option 1</b> <input type="checkbox"/> 0.95% (0.60% broker / 0.35% TT) <input type="checkbox"/> <b>Option 2</b> <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"/> 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
%	<input type="checkbox"/> Alternate trail as authorised by RM which will change the interest rate (name)
<b>Residential SMSF</b>	<input type="checkbox"/> Standard trail 0.20% included in rate
<b>Residential investors and owner occupiers</b>	<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	% <b>OR</b> , 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	<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>PLUS:</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, <b>OR</b>
<input type="checkbox"/> Evidence of funds to complete (purchase)		<input type="checkbox"/> 1 year tax returns & NOA, <b>OR</b>
<input type="checkbox"/> Minimum 6 months bank statements		<input type="checkbox"/> 1 year financial statements, <b>OR</b>
		<input type="checkbox"/> 1 year tax returns & NOA and 1 year financial statement
	<b>QUICK DOC</b>	<input type="checkbox"/> Separate Income Self Certification for each borrower and guarantor
	<b>SMSF LOAN</b>	<input type="checkbox"/> Refer specific SMSF Loan checklist
	<b>RESIDENTIAL</b>	<input type="checkbox"/> NCCP addendum is completed and signed

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

Signature

Date