

Entity holding Referral Agreement with Nexus Partners

Name of individual referring  Mobile

## Client Details

Client Name  Mobile  Landline

Address  Email

State  Postcode  Preferred method of contact  Mobile  Landline  Email

## Client Requirements

The clients consent to the referrer passing their personal details to a lender/or authorised person

Finance is required for:

Purchase/Construction of property Please provide an approximate guide as to the amount of finance required

Refinance of existing mortgage Please provide details of the client's current bank/lender

Other

Client is currently  Self employed  PAYG Employee

The client has requested contact from the following lenders. (Please select one lender from the list below).

Note that you can only select a lender in Section A if you hold a current accreditation with that lender under Nexus Partners. Lenders in Section B are available to all referrers and do not require a specific lender accreditation.

### SECTION A

- ANZ Residential
- ANZ Commercial
- Bank SA
- Bank of Melbourne
- Bankwest
- St George
- Westpac Residential
- Westpac Commercial

### SECTION B

- Axis Lending
- BC Invest – non resident lending
- Community First CU
- E-Broker
- Eden Services Group - Financier Aust
- Household Capital
- IBN Direct
- Liberty Financial
- Mortgage Ezy
- Nexus Concierge
- Nexus Leasing (via Geelong Financial Group)
- Pepper Money
- Spotcap

Nominate your preferred banker (if known)

The referrer must certify that each of the following has taken place prior to the referral being made (please tick)

- The referrer has disclosed to the client/s any commission or associated benefits applicable to this referral.
- The clients have provided the referrer with consent to forward their details to a licensed 3rd party provider.

## Referrer Acknowledgement

### The referrer warrants

- The Referrer is not banned from engaging in a credit activity.
- The Referrer does not require the client to pay a fee in relation to the referral.
- The Referrer and the Licensed Person are both parties to an agreement which specifies the conduct that the Referrer can engage in.
- The Referrer shall provide the Client's name and contact details to the Licensed Person within 5 business days after informing the Client that the Licensed Person is able to provide the Credit Services.
- The Referrer does not conduct a business as part of which the referrer contacts persons face to face from non-standard premises i.e. from a stall in a shopping centre.
- The Referrer engages in the act of the referral as a matter incidental to the carrying on of a business that is not principally making contact with persons to give their names or other details to another person.
- The Referrer, if unlicensed, is not authorised to engage in credit activities as defined within the National Consumer Credit Protection Act (NCCP). Unless otherwise authorised, the referrer must refer clients requiring credit assistance to an appropriately licensed or authorised person.

### Please only select 1 (one) Licencing option

- The referrer holds an Australian Credit Licence - number #
- The referrer is appointed as an Authorised Credit Representative - number #
- The referrer is not licensed and hereby confirms that in making this referral they have not provided credit advice to the client (as defined by ASIC), and has not engaged in a credit activity (as defined by ASIC).

Please add any additional notes regarding this referral here

I,  hereby provide my consent for this client referral to be actioned by the selected lenders. I further confirm that I have taken reasonable steps to ensure the information provided herein is true and correct to the best of my knowledge, and represents a request the client has made for the selected lenders to contact them.

Signed

Dated