



Loan referral form

CUSTOMER DETAILS

Full name(s)	1	<input type="text"/>	Phone	<input type="text"/>
	2	<input type="text"/>	Phone	<input type="text"/>
Preferred contact time	<input type="text"/>			
Residential address	<input type="text"/>			
Email address	<input type="text"/>			

CLIENT FINANCE NEEDS

The Client(s) have given their consent to the Referrer to disclose their personal information to Funding.com.au for the purpose of arranging an obligation free consultation regarding their finance needs as outlined below:

LOAN NEEDS	<input type="checkbox"/> Bridging	<input type="text"/>
	<input type="checkbox"/> Building	<input type="text"/>
	<input type="checkbox"/> Business	<input type="text"/>
	<input type="checkbox"/> Other	<input type="text"/>

EMPLOYMENT ☐ PAYG ☐ Self-employed

Comments

REFERRER DETAILS

Full name(s)	<input type="text"/>		
Company	<input type="text"/>		
Phone	<input type="text"/>	Email address	<input type="text"/>
Address	<input type="text"/>		
Comments	<input type="text"/>		

REFERRER ACKNOWLEDGEMENT

Do you agree to comply with the National Consumer Credit Protection Act 2009 (NCCP Act)?

Yes ☐ No ☐

Are you or have you ever been banned from engaging in credit activities?

Yes ☐ No ☐

Do you charge the consumer a fee to refer?

Yes ☐ No ☐

Do you conduct business by contacting people face-to-face from non-standard business premises (e.g. a stall in a shopping mall or airport such as credit card providers sometimes do)?

Yes ☐ No ☐

Do you agree to disclose to the consumer any benefits that may be received by the referrer including commission?

Yes ☐ No ☐

Do you agree to refer the client for funding to deal with the client including the application and will not assist the application (no credit activity)?

Yes ☐ No ☐

Do you agree to pass customers' contact details including consumer's name, contact details and a short description of the purpose for which the consumer may want the credit (if known) to funding with 5 days?

Yes ☐ No ☐

Referrer name

Signature

Date

Please email completed form and supporting material to loanservices@funding.com.au

For online referrals, commissions, accreditation or FAQ visit funding.com.au/partners/

For support call **1300 44 33 19** or loanservices@funding.com.au

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THIS FORM HAS TWO (2) PAGES. PLEASE ENSURE PREVIOUS PAGE HAS BEEN COMPLETED.

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