

Broker Scenario Submission

Use this form to provide enough information for an initial scenario review or indicative terms.

Important: This template is for indicative assessment only. A formal application, full supporting documents and credit assessment will be required before approval.

1. Broker Details

Broker Name

Email

BDM / Folio Contact

Company / Aggregator

Phone

Urgency

2. Loan Overview

Loan Amount Requested

Product / Scenario Type

Proposed Term

Existing Lender (if refinance)

Loan Purpose

Requested Structure

Funds Required By

Current Rate / Repayment (if known)

3. Borrower Snapshot

Borrower Name(s)

Entity / Ownership Structure

Brief Income / Employment / Business Summary

Borrower Type

Income Type

4. Security Details

Security Property Address / Location

Property Type

Estimated Value / Purchase Price

Existing Debt

Estimated LVR

Valuation Available?

Security Tenure

Security Notes

5. Credit Profile

Credit Profile

Any arrears, defaults or judgements?

Credit History Notes

For credit-impaired scenarios, please include the type of impairment, amount, date, current status and a brief explanation. This helps us determine the most suitable pathway quickly.

6. Exit Strategy and Repayment Position

Primary Exit Strategy

Expected Exit Timeframe

Repayment Method During Term

Interest Capitalisation Requested?

Exit Strategy Details / Supporting Commentary

7. Broker Commentary

Why does the deal make sense? Include strengths, risks, mitigants and any time-sensitive points.

8. Indicative Documents Available

- | | |
|--|---|
| <input type="checkbox"/> ID / borrower details | <input type="checkbox"/> Income verification |
| <input type="checkbox"/> Bank statements | <input type="checkbox"/> Existing loan statements |
| <input type="checkbox"/> Rates notice | <input type="checkbox"/> Company / trust documents |
| <input type="checkbox"/> Accountant letter / declaration | <input type="checkbox"/> Credit report / impairment notes |
| <input type="checkbox"/> Contract of sale | <input type="checkbox"/> Valuation / appraisal |
| <input type="checkbox"/> Rental statement / lease | <input type="checkbox"/> Exit strategy evidence |

Tick documents currently held. A full supporting document checklist may be requested once the scenario pathway is confirmed.

9. Submission Notes

Additional Notes / Special Instructions

10. Declaration and Submission

By submitting this scenario, the broker confirms that the information provided is a summary for initial review only and that any formal application will be subject to responsible lending obligations, full credit assessment, satisfactory supporting documents and applicable policy at the time of assessment.

Broker Signature / Acknowledgement

Date

Submit your scenario

Submit via the "Send a Scenario" button on the Become a Partner page, or contact your BDM on 1300 304 572.

For urgent transactions, include settlement date and required response timeframe in the Broker Commentary section.