



Home Loan Offset Accounts

We are currently experiencing high volumes of product conversion requests.

This is a direct result of incorrect product selection in ApplyOnline at application submission.

The most common examples are:

- Loan settled with offset when not requested
- Loan settled without offset when offset requested

We ask your assistance during the loan assessment process, to avoid post settlement corrections.

- Please check product selection is correct in ApplyOnline
- Ensure you understand your client(s) needs and accurately complete the Responsible Lending Form
- Confirm if offset is requested YES/NO and enter application note
- If application has multiple splits, ensure correct loan has the offset attached, offsets may not be required for each loan
- Our assessor will contact you to confirm the product(s) selection
- Please read and check the formal approval letter is correct.

If you discover a product selection error, please contact us immediately so we can rectify this prior to producing contracts. Any bank errors will be prioritised.

If you have any questions, please contact Select Assist on 1300 738 336 or your Partner Relationship Manager.

Regards,
Cosi Lanzoni
Senior Manager Strategic Partners



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