



Personal Loan – New Portal Hints & Tips

It's been a little over a month since the launch of our new portal and we are pleased to say we have seen some extraordinary results come through. Thank you for your support!

Here's a few hints and tips to assist.

Quote and Application

A reminder, the quote and application default to the variable rate product. Please ensure you check and amend if a fixed rate product is required.

Settlement Process

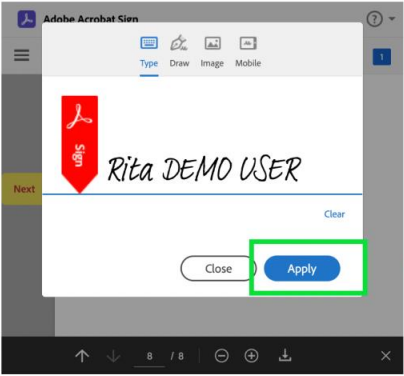
Step 1 – Customer acceptance (encourage your customers to use a PC where possible or if using a phone, use landscape).

LATITUDE MONEY Rita

Loan Contract

After signing the contract, click the Continue button at the bottom of this page.

Letter of offer



Click 'Apply'

Continue

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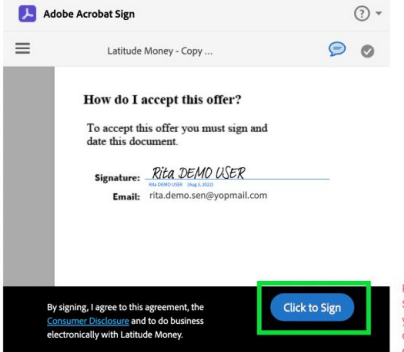
Credit provided by Latitude Personal Finance Pty Ltd
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LATITUDE MONEY Rita

Loan Contract

After signing the contract, click the Continue button at the bottom of this page.

Letter of offer



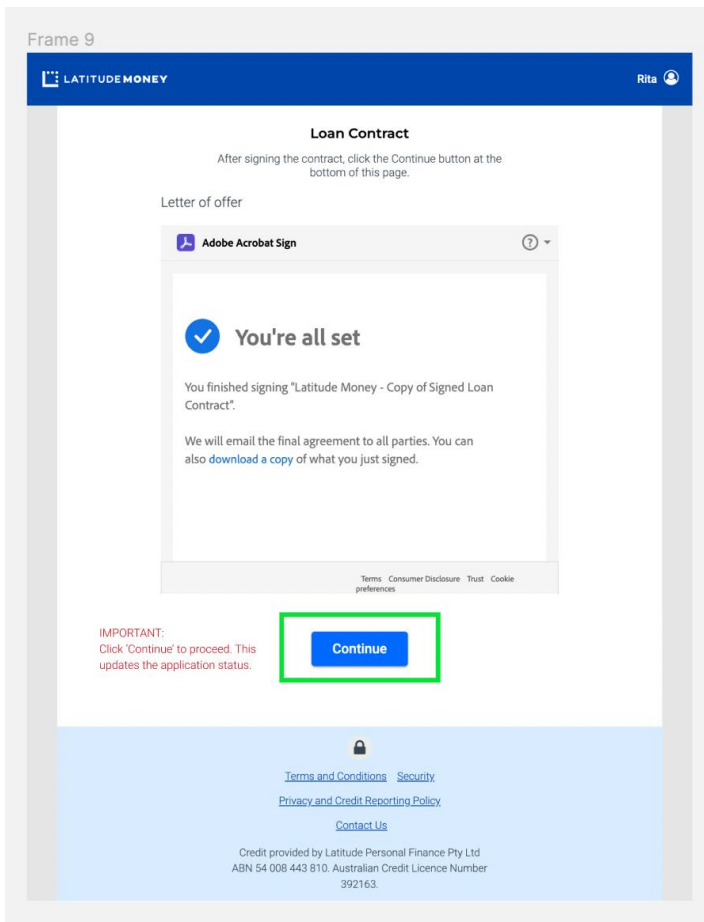
Press 'Click to Sign' to confirm your signature details are correct.

Continue

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Ensure you remind your customer to click on the 'Continue' button to progress to next stage.



Step 2 – Disbursement Details (you will need to enter the banking details for your customer – this will be shown as ‘disbursement info incomplete’). **IMPORTANT: Customer's repayment will be direct debited from this account.**

Bank Details

Please provide a bank account for Ruth to receive loan funds. The bank account must be an account where their primary income is deposited into

Account number 765376828	BSB number 762-367
Bank name Rita	Account Holder Name Demo User

Confirmations

- The direct debit request must be signed in accordance with the signing authority for the nominated account.
- I confirm that the applicant has read and, understood and agrees to the terms and conditions set out in the [Direct Debit Request Service Agreement](#).

Accept and Continue

< Back

A ‘Congratulations’ message will display – status will display as ‘pending settlement’

Congratulations Sandip!

We will transfer the funds into Rita's account within the next business day.
Thank you for choosing Latitude Loans.

Okay

Attached is the Customer Contract Acceptance Guide for your reference.

If you have further questions, please reach out to your Relationship Manager or contact Broker Support on 1800 035 902.



We're here to help

Have questions? We've got answers!
Just call us on **1800 035 902** to chat or email
broker.support@latitudefinancial.com

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