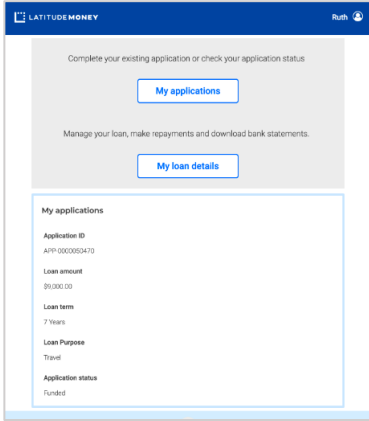
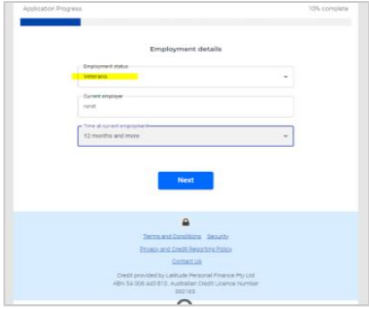

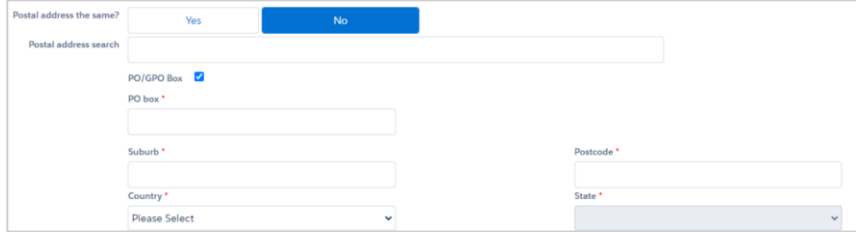


Broker Portal Enhancements

We have made some enhancements to the Broker Portal which will improve both the upfront Broker experience, and the Customer experience post settlement. From Tuesday 11th October 2022, the following changes will be live:

New Feature	Screenshot																												
<p>Your customers will now have the ability to log-in and see their loan application information, and access their account after their loan is settled.</p>																													
<p>We have added an additional employment status. If you have a customer who is a veteran, you will now be able to submit quotes and applications for customers in this employment status.</p>																													
<p>You will now have the ability to download and view a copy of your customers signed loan contract, post settlement, from the Broker Portal. Please note, you will only be able to do this for applications you have processed.</p>	 <table border="1"> <thead> <tr> <th>Date</th> <th>Name</th> <th>Application ID</th> <th>Loan Amount</th> <th>Loan Purpose</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>28/09/2022</td> <td>Ruth Orlando</td> <td>APP-000050441</td> <td>\$ 15,000.00</td> <td>Medical/Dental</td> <td>Review in Progress</td> <td>Print</td> </tr> <tr> <td>15/09/2022</td> <td>Ruth Orlando</td> <td>APP-000050241</td> <td>\$ 9,000.00</td> <td>Debt consolidation</td> <td>Funded</td> <td>Print</td> </tr> <tr> <td>14/09/2022</td> <td>Ruth Orlando</td> <td>APP-000050241</td> <td>\$ 30,000.00</td> <td>Car purchase/Home</td> <td>Pending</td> <td>Print</td> </tr> </tbody> </table>	Date	Name	Application ID	Loan Amount	Loan Purpose	Status	Action	28/09/2022	Ruth Orlando	APP-000050441	\$ 15,000.00	Medical/Dental	Review in Progress	Print	15/09/2022	Ruth Orlando	APP-000050241	\$ 9,000.00	Debt consolidation	Funded	Print	14/09/2022	Ruth Orlando	APP-000050241	\$ 30,000.00	Car purchase/Home	Pending	Print
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<p>We have introduced a field to capture Postal</p>																													

Address, if your customer would like mail to be sent to an address that is different to their residential address. This includes the option to have a PO box.



Postal address the same? Yes No

Postal address search

PO/GPO Box

PO box *

Suburb *

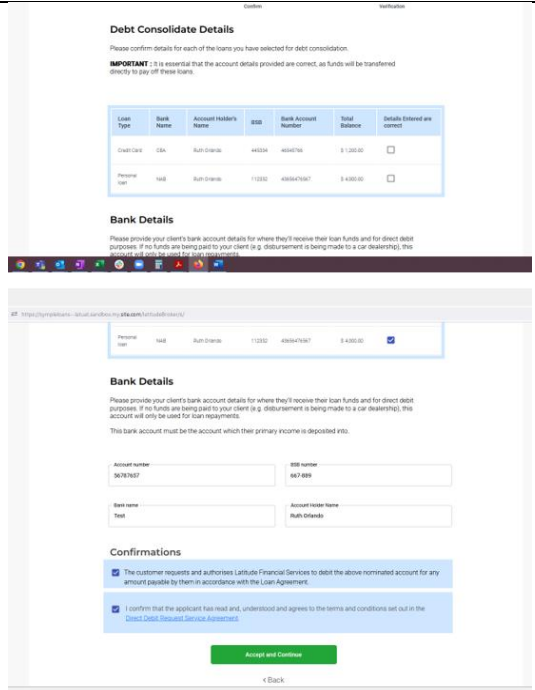
Country *

Please Select

Postcode *

State *

If your customer has a refinance or debt consolidation loan, you will be asked to validate the payout details displayed in their application, prior to proceeding to loan settlement, to ensure we send the money to the right place. If the details are correct, you will need to click accept and continue.



Debt Consolidate Details

Please confirm details for each of the loans you have selected for debt consolidation.

IMPORTANT: It is essential that the account details provided are correct, as funds will be transferred directly to pay off these loans.

Loan Type	Bank Name	Account Holder's Name	BBS	Bank Account Number	Total Balance	Details Entered are correct
Credit Card	USA	Ruth Daniels	45234	456789	\$ 1,234.50	<input type="checkbox"/>
Personal Loan	USA	Ruth Daniels	12332	45678901	\$ 4,567.80	<input type="checkbox"/>

Bank Details

Please provide your client's bank account details for where they'll receive their loan funds and for direct debit purposes. If the funds are being paid to your client (e.g. disbursement is being made to a car dealership), the account will only be used for loan repayments.

This bank account must be the account which their primary income is deposited into.

Account number: 90787657 BBS number: 667 689

Bank name: First Account holder Name: Ruth Daniels

Confirmations

- The customer requests and authorises Latitude Financial Services to debit the above nominated account for any amount payable by them in accordance with the Loan Agreement.
- 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

Please note, there will be no impact to inflight applications.

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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