

DocuSign now available for ACC Form.

BankSA emails never ask for your personal details or link to a login page. More info: banksa.com.au/hoaxemails [View online](#)



In the know. Important updates for brokers.

Hi,

At BankSA, we believe it's important to consistently look for ways to improve outcomes for you and your customers. Stay up to date with the latest information to help your business and clients, including:

- Changes to Credit Policy and ApplyOnline.
- Enhancements to BrokerHub.

Your latest must-knows.

Changes to Credit Policy and ApplyOnline.

From **27 March 2023** (unless specifically noted otherwise), the following changes will apply for new and existing customers and new applications, (including applications for an increase to an existing loan or any servicing/variation activity requiring a serviceability assessment), as follows:

- DocuSign may be accepted for 'Acknowledgement, Confirmation and Consents' (ACC) and Long Application Form.
- Salary Sacrifice Declaration Form is no longer required.
- Reduced time frame for the re-use of existing valuations.
- Desktop Valuation Limit has increased.
- Foreign PAYG employment earning AUD income.
- Genworth has changed its name to Helia.

[Learn more](#)

Enhancements to BrokerHub.

Don't forget, you are able to contact your assessor to discuss your application. If you can't reach them, you can now schedule a call with the assessor using our new 'Request a call back' option on BrokerHub by logging a case.

Log a Case for Loan Application

Step 1 of 2

Add Case Details

Add Attachment

Case Details

Case Type	<input type="text" value="--None--"/>
Case Sub Type	<input type="text" value="--None--"/>
Due Date	<input type="text" value="11/01/2023"/>
Description	<input type="text"/>
Linked Applications ⓘ	<input type="text"/>

Log a Case for Loan Application

Add Case Details

Case Details

Case Type	Enquiry
Case Sub Type	Assessor Return Call
	<p>Please consider calling the assessor directly on the contact details below before raising a request.</p> <p> [REDACTED]</p> <p> [REDACTED]</p> <p> [REDACTED]</p>
Due Date	11/01/2023
Callback Subject	--None-- <small>Please fill Callback Subject , as it required for Case Sub Type Assessor Return Call</small>
Callback Reason	--None-- <small>Please fill Callback Reason , as it required for Case Sub Type Assessor Return Call</small>

Helpful hints and tips.

Completing customer Identity Verification.

Don't forget, customers can now enjoy the convenience of completing their ID verification requirements using NextGenID.

If a customer chooses to opt out of NextGenID, or where NextGenID may not be available, here are some helpful tips to follow when completing customer identification using our physical form.

- Collect identification information and documentation from your customer.
- Ensure all photographic documentation looks like the customer.
- Resolve any discrepancies regarding your customer's identity.

- If you discover any inconsistent information, or information that seems out of place (for example, a customer claiming to have a source of funds or wealth that is inconsistent with other information about them) then you should perform further investigations until you have a full and complete picture of the person and their circumstances.
- An unusual matter (previously called a suspicious matter) is any activity that's out of character or may indicate that a customer:
 - isn't who they claim to be.
 - is involved in a crime such as tax evasion, terrorism financing or money laundering.
 - is involved in a matter that would be of interest to law enforcement.
- Look for red flags – something that doesn't seem quite right. This might indicate an unusual matter.
- If you identify an unusual matter, you must submit an Unusual Matter Report (UMR) to us.

You can request this form from your BDM.

Reminder: ABN exempt on specific payslips and employer letters – for general use.



Did you know, foreign employers who are not registered in Australia, and all Australian government bodies / departments (inclusive of local government councils), are exempt from having to include an ABN on payslips and employer letters – for general use.

You've got questions? We've got time to talk.



[1300 137 532](tel:1300137532) (Monday to Friday 8am – 5pm)



banksa.com.au/brokers

Thanks,

Your BankSA team

Accessibility support: At any time, you can inform us how you would prefer to be contacted. If you are deaf and/or find it hard hearing or speaking with people who use a phone, you can reach us through the National Relay Service (NRS). To use the NRS, you can register by visiting <https://www.infrastructure.gov.au/media-communications-arts/phone/services-people-disability/accesshub/national-relay-service>

Visit [BankSA Access and Inclusion](#) for further information on our accessible products and services for people with disability.

Things you should know:

Conditions, credit criteria, fees and charges apply. Based on BankSA's credit criteria, residential lending is not available for Non-Australian resident borrowers. More information available at banksa.com.au/brokers.

This communication is intended for the recipient only and is not for distribution to your customers or any member of the general public. The information contained in the email is current as at Wednesday 22 March 2023. For more information on any of the promotions, products or services mentioned in this email, please contact your local Business Development or Lending Manager. This email is to be used as general information only and should not be considered a comprehensive statement on any matter and should not be relied upon as such. This email has been prepared without taking into account any individual objectives, financial situation or needs.



BankSA Secure security reminder:

BankSA will never send you a link that directly opens our sign in page, or any links requesting your personal or financial information. Always type banksa.com.au into your browser or use the BankSA mobile banking app to securely access your banking. For more information visit banksa.com.au/hoaxemails. Before accessing emails or the Internet, always ensure your computer has up-to-date security software. Find tips to protect yourself and avoid scams and viruses at banksa.com.au/security.

BankSA sent this message to Connective Lender Services Pty Ltd at product@connective.com.au, these details are shown in order to provide guidance on the true sender of this email.

This is a service message sent by BankSA for the purpose of communicating factual information relating to our products or services. An unsubscribe option is not available due to the nature of this message.

If any of the information related to (or provided by) the Westpac Group that you rely on is printed, downloaded or stored in any manner on your systems, files or otherwise, please ensure that you update your systems and files with the most up-to-date information provided by us and rely only on such updated information.

© BankSA - A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL and Australian credit licence 233714. The Westpac Group, 275 Kent Street, Sydney, NSW 2000, AUSTRALIA

[Privacy](#)