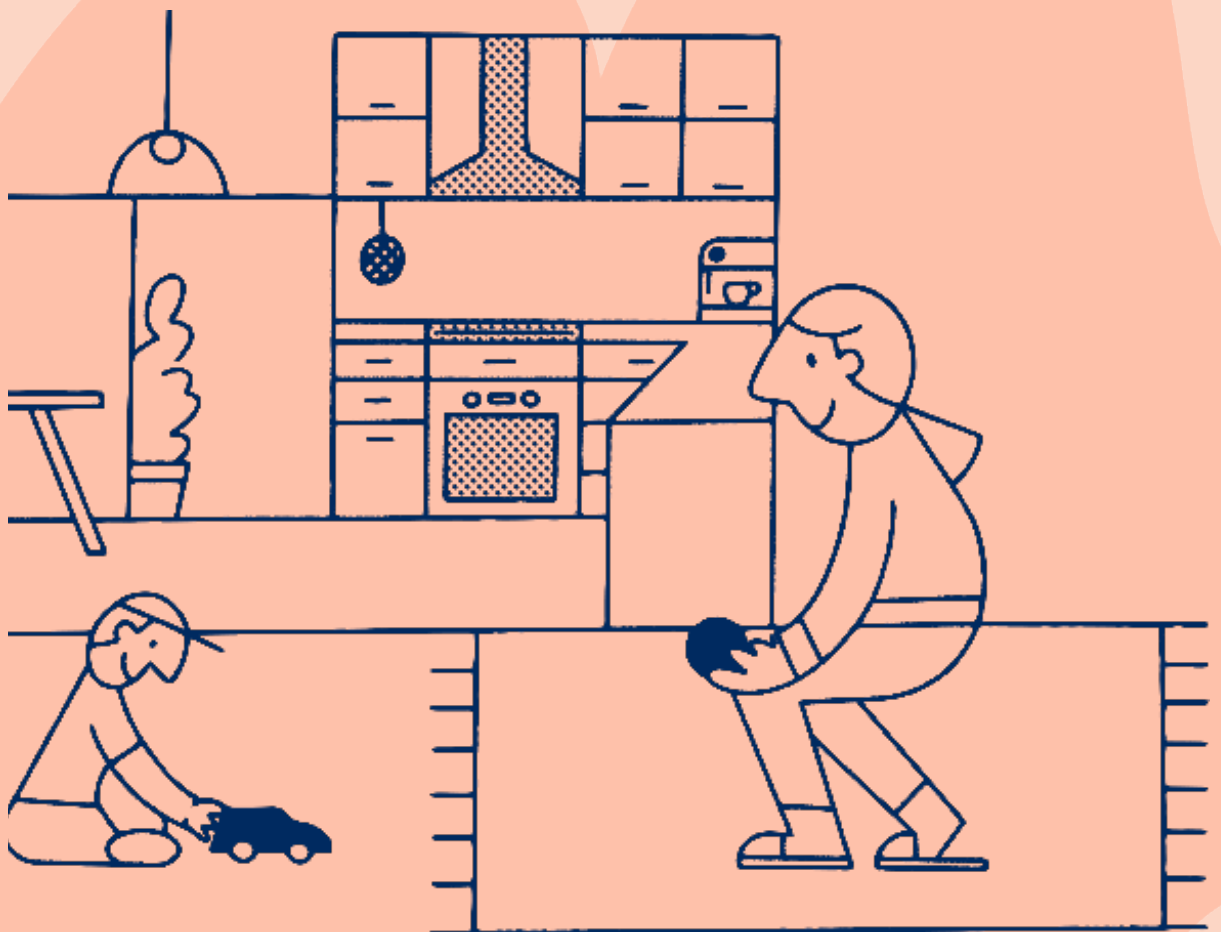


Submitting a loan

step-by-step guide



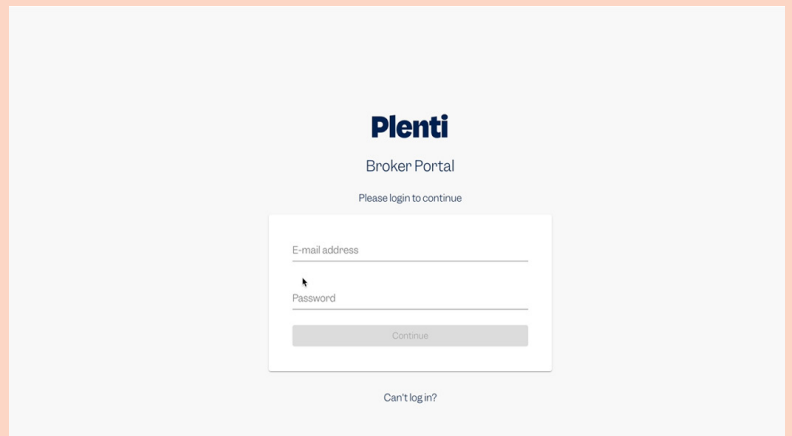
Submitting a personal loan

Application

1

Create application

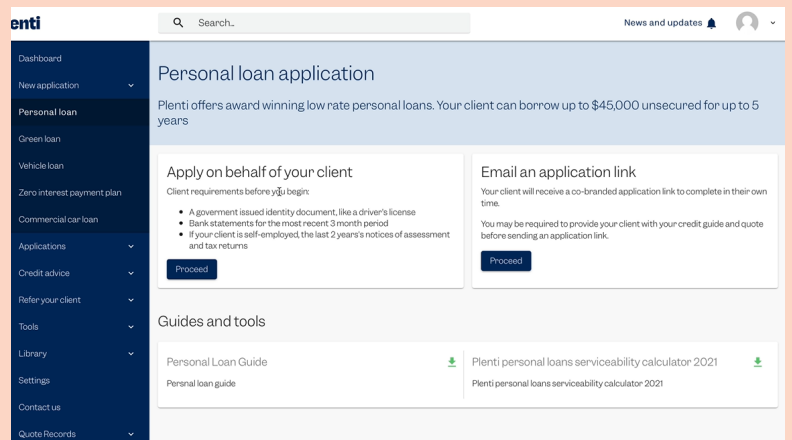
Log into the [broker portal](#)



2

Select new application and then choose 'personal loan'

Apply on behalf of your client is the option you need to select. You will also be able to access our credit guide, which includes our rate chart. Our servicing calculator is also located here.

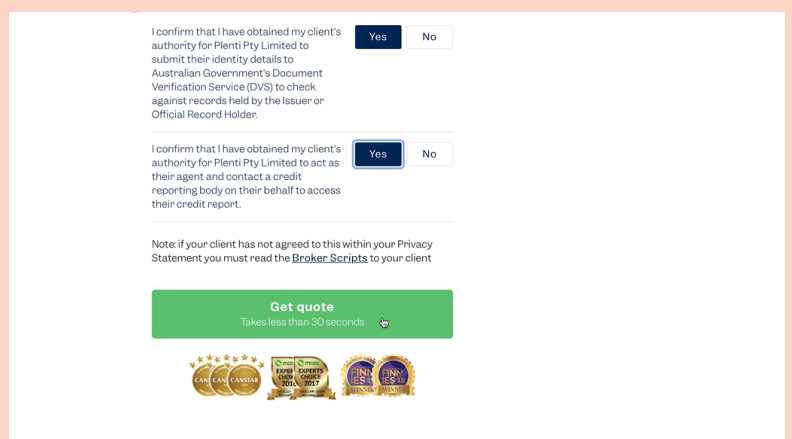


3

Complete application and submit to get quote

Finalise customer's details and submit the application to obtain a quote.

Once you select 'get quote' we will complete a soft credit check.



4

Customise customer's loan

Complete the customisation options for the customer's loan including loan amount and repayment information

AMOUNT REQUESTED	\$10,000.00
LOAN PURPOSE	Debt Consolidation
LOAN TERM	7 years
ANNUAL RATE	10.49%
MONTHLY REPAYMENT	\$191.63
Fees	
Credit Assistance Fee	\$379.00
Income	
Brokerage	\$990.00

5

Save quote and continue with application

Finalise the loan and repayment amounts and then save the quote to continue on with the application

6

Send client Plenti's disclosure documents

You have the option of sending your customer Plenti's disclosure documents through our automated platform (recommended) or sending your own email to your customer.

7

Finalise loan application

Finalise the details of your customer's loan including information on your client's income, living expenses, debts, etc.

8

Finalise and submit

Finalise and submit the loan application.

How long it takes for the application to be approved depends upon the type of loan it is.

Ensure notes are added to every loan.

9

Verify your client's identity and income

Verify your client's identity using the verify option.

Verify your customer's income by sending a link to the client or entering your client's document ID from BankStatements.com.

Alternatively, you can upload a copy of your client's bank statements covering the past 90 days. Manually uploaded documents will take longer to verify.