

# Submitting a loan step-by-step guide





## Submitting a personal loan

## Application

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**Create application** Log into the <u>broker portal</u>

	Broker Portal	
F	lease login to continue	
E-mail address		
Password		
	Continue	

#### 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.



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#### Complete the RateEstimate and submit to get quote

We will perform a soft-credit check to give your client a personalised quote.

I confirm that I have obtained my client's authority for Plenti Pty Limited to submit their identity details to Australian Government's Document Verification Service (IVS) to check against records held by the Issuer or Official Record Holder.	Yes	No
I confirm that I have obtained my client's authority for Plenti Pty Limited to act as their agent and contact a credit reporting body on their behalf to access their credit report.	Yes	No
Note: if your client has not agreed to this Statement you must read the <u>Broker Sc</u>	within your Pr <u>ripts</u> to your o	ivacy client
<b>Get quote</b> Takes less than 30 seco	onds 🍖	
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## Application





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### Customise the quote

Choose the preferred loan term and origination fee structure.









Customise your client's repayments Monthly repayments are estimates and include all fees and charges

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Save quote Continue with application Plenti We're here to help ad help with your application you can always get contact with us via phone or email below 1000 889 332 Email

Need help? () Help Center 🤳 1300 889 332 🖂 Email

AMOUNT REQUESTED \$10,000.00 LOAN PURPOSE Debt Consolidation LOAN TERM 7 years ANNUAL RATE 10.49% MONTHLY REPAYMENT \$19163 Eas Credit Assistance Fee \$379.00 Incoma Brokerage \$990.00

#### Save quote and continue application

Once the quote has been saved you can return to your dashboard at any time to continue the application.



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.

### Plenti

Finalise loan application Your client's \$10,000 loan could be approved in minute

Important: Please send your client Plenti's disclosure documents Vou can do this by sending your customer a link to these document on howe our datrom send an automated email on your behalf.

Have us send an email for you Excludition
We will send an email or your behalf with a link to the
relevant disclosure documents incoder thermalities

Send your own email to your client
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Submit and continue application

## Application





## Finalise loan application

Confirm your customer's information including income, employment, and liabilities. We pre-fill some of your customer's details from their credit file - you can notify us if there are any changes.

Submit the loan application to continue to the next step. Please note there is no hard credit check at this stage.

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#### Verifying your customer's identity and income

Enter your customer's ID details to verify their ID using GreenID. If this fails, please upload all forms of ID that you hold.

Provide us with your customer's Bank Statements by entering your Document ID, or send our link to the customer to complete.

If using manual statements, these can be uploaded instead, however, expect delayed assessment.

Top Tip - ensure illion's BS.com is used to ensure accurate and rapid assessment.



#### Plenti Need help? Verify your client's income Your client's \$10000 loan could be approved in minut Regulation requires us to verify your income and expendence before we can approve your loan

Income verification - Bank statements For the fastest decisions, you can send a link to your clie allowing them to securely provide access to their bank statements

Itematively, you can enter your client's document ID from ankStatements.com to verify. Learn more

Is there another option? If you'd prefer you can upload a copy of your client's bank statements covering the past 90 days. Manually uploaded documents will take us longer to verify. b I need to the memory of the term prevention of the law personal ban res are also Neely ing your bank ing your bank ing your bank ing your bank to help the second of the law personal bank ing your bank ing your bank to help the personal bank to help t

Need help? () Help Center 2 1300 889 332 🖂 Email

rapidly verify your income and expenses, helping us to promptly assess your loan application (sometimes within minutes). It also means we can transfer your funds faster!