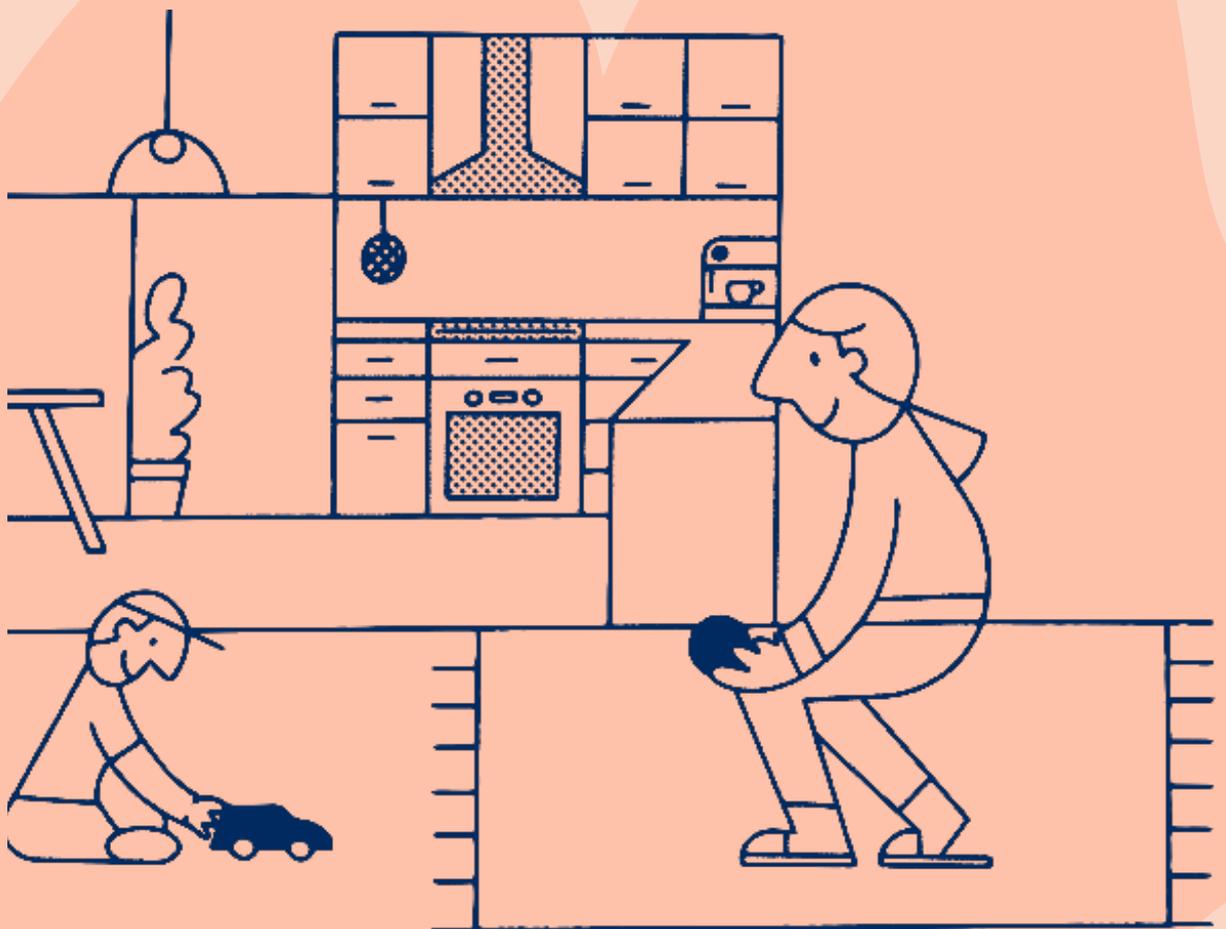


Submitting a loan

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

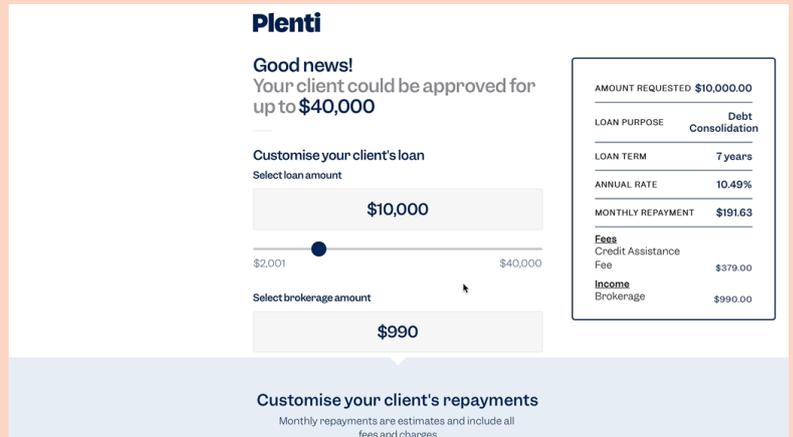
Complete the RateEstimate and submit to get quote

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

4

Customise the quote

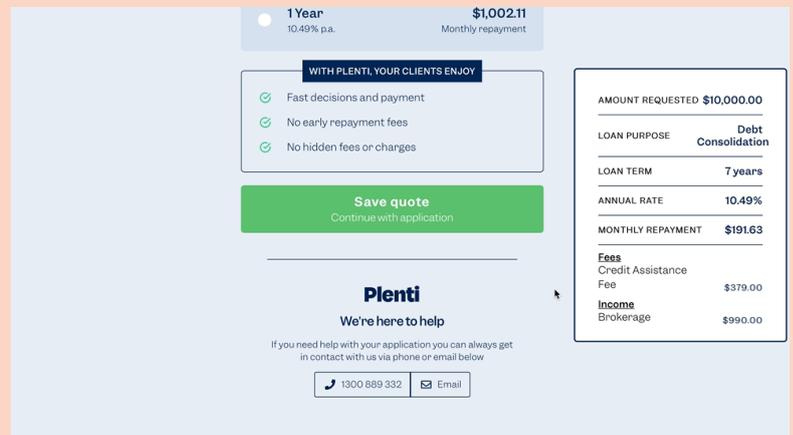
Choose the preferred loan term and origination fee structure.



5

Save quote and continue application

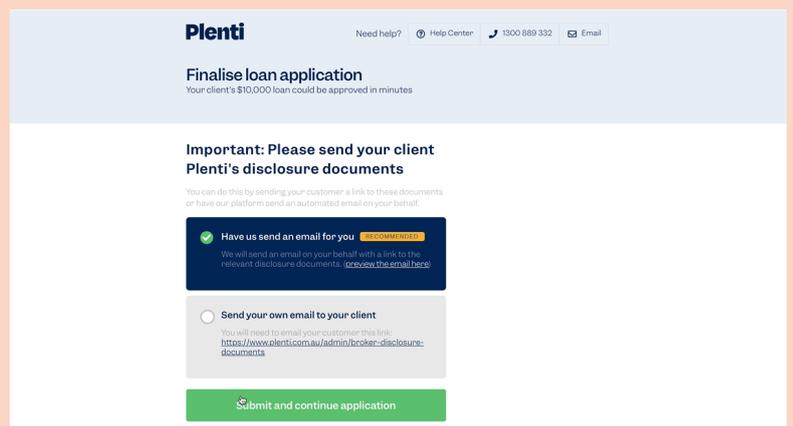
Once the quote has been saved you can return to your dashboard at any time to continue the application.



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

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.

8

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.