Adviser Online Application Reference Guide

Need more information?

Call 1300 307 807

- Visit leveraged.com.au
- Email customerservice@leveraged.com.au
- **Post** GPO Box 5388, Sydney NSW 2001



Overview

This reference guide is to help licensed advisers with the online application process for their clients. The Leveraged online application form takes between 10-15 minutes to complete and includes the following features:

- The ability to save partially completed applications.
- The ability to retrieve previously saved applications (enabled by Application ID).
- A prefill form option enabling advisers to start the application process and then hand over to clients to complete.
- The ability to upload supporting documentation prior to the application being submitted.
- Inbuilt field validation to minimise errors and resubmission.
- Point to point communication via email with advisers and their clients throughout the process.
- Execution documents are issued to both advisers and their clients upon submission of the application.

Products

The Leveraged online application form dual functionality for advisers and their clients can be used for the following products:

- Margin Loan (ML).
- Investment Funds Multiplier (IFM).

Who can apply?

- Individuals.
- Joint borrowers.
- Companies.
- Trusts.
- Existing customers applying for Exchange Options Plus (EOP) and Short Plus (SP).

Adviser to client hand over

• Advisers have the option of completing the whole application on behalf of their client or partially completing the application and then handing over for the client to complete.

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- An application can be handed over after the Investment Details section.
- When entering email addresses, please ensure adviser and client email addresses are not the same.
- All documentation requiring client signature/s will be emailed to both the client and adviser.

Starting the online application

Welcome	Leveraged Online Application Form
Loan Requirements	Velcome
Next Steps	Thank you for considering a Leveraged Loan. Once you have completed your online application, you will be provided with some additional documents that you will need to print, read thoroughly, sign and return to Leveraged.
	Your applications can not be assessed and activated until we receive all signed documents from you.
	T Are you a New as Eviding Client?
	New Existing Client?
	and a second g
	* Which loan type would you like to apply for?
	Margin Loan Investment Funds Multiplier (IF-W) Loan Direct Investment Loan
	* How would you like the account to be set up?
	An individual Joint Company
	* Are you completing this application for yourself or on behalf of somebody else?
	For myself On behalf of somebody else
	who can apply How this works Information needed
	Over 18 years old Apply in 10-15 minutes Each applicants Tax File Number, this can be provided later, there may be financial consequences for individuals who choose not to under their TEN

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Saving your application

Your application will automatically start saving once you have entered your email address. You will be asked to create login details (or use your existing login details), which you can later use to retrieve your saved application. An email notification under the subject 'Leveraged Equities Online Application Created' will be sent to the email address you provided. Enclosed in the email will be a link to the saved application.

2				
				+) Login
My Dashboard				
Assigned To Me				
Application Id	Created	Modified	State	_
Leveraged Online Applica	tion Form			
G# 133	20 Mar 2018 12:39	20 Mar 2018 12 39	Created (Draft)	
C# 132	20 Mar 2018 12 15	20 Mar 2018 12 38	In Progress (Draft)	
			Bandlet	bood
Disclaimer Privacy Policy Site N	Aap © Copyright 2018 Leveraged Equities Limited A	BN 26 051 629 282 AFSL 360116	Proudly part of Adelaide	eBank

Loan requirements, adviser prefill information

In this section advisers can commence to prefill the application on behalf of their clients.

Borrower Details Facility Details Facility Details Adviser to Customer Adviser to Customer Add Over O Next Steps C	Borrower Details	
Facility Details Predit Information Adviser to Customer Adviser to Customer By ticking this box, I represent that I am a Financial Adviser and that I am authorised to complete this application on behalf of the Borrower. As you are completing this application on behalf of the customer, please provide your details below. Also, upon submission of an application, please note the client will receive the execution documents as well as a copy being emailed directly to yourself as the adviser. 	Loan Requirements	
Investment Details Adviser to Customer O Hand Over Next Steps O Next Steps * By ticking this box, I represent that I am a Financial Adviser and that I am authorised to complete this application on behalf of the Borrower. Next Steps * By ticking this box, I represent that I am a Financial Adviser and that I am authorised to complete this application on behalf of the Borrower. As you are completing this application on behalf of the customer, please provide your details below. Also, upon submission of an application, please note the client will receive the execution documents as well as a copy being emailed directly to yourself as the adviser. * Given Name * Email Address * Contact Number * Borrower Name	Facility Details O	
Adviser to Customer O Hand Over As you are completing this application on behalf of the customer, please provide your details below. Next Steps Also, upon submission of an application, please note the client will receive the execution documents as well as a copy being emailed directly to yourself as the adviser. * Given Name * * Email Address * * Contact Number * * Borrower Name *	Investment Details O	rial Advisor and that I am authorized to complete this application on babali of the Parrawar
Next Steps Also, upon submission of an application, please note the client will receive the execution documents as well as a copy being emailed directly to yourself as the adviser. * Given Name • • Email Address • • Contact Number • • Borrower Name •	Adviser to Customer O Hand Over	
* Given Name Last Name Firm Firm Contact Number Borrower Name	Next Steps O Also, upon submission of an application, please note	the client will receive the execution documents as well as a copy being emailed directly to yourself as the adviser.
Last Name Last Name Fim Contact Number Borrower Name	* Given Name	
* Last Name Firm Firm Email Address Contact Number Borrower Name		
* Fim * Email Address * Contact Number * Borrower Name	* Last Name	
* Firm * Email Address * Contact Number * Borrower Name		
* Email Address * Contact Number * Borrower Name	* Firm	
* Email Address * Contact Number * Borrower Name		
* Contact Number * Borrower Name	* Email Address	
* Contact Number * Borrower Name	Endir/todio55	
* Borrower Name	1 Contact Number	
* Borrower Name	Contact Number	
* Borrower Name		
	* Borrower Name	

Facility details

In this section you are asked to provide details and instructions relating to:

- Contact details for margin calls, credit limit exceeds, market disruptions and other important notices
- Account access and authority
- Bank Accounts
- Communications

Leverage	d	(•	Login
The professional's choi	ce		
Loan Requirements		Leveraged Online Application Form	
Borrower Details	۲	Facility Details	
Facility Details			
 Contact Details for Margin Call, Credit Limit exceeded, Market Disruption and other Important 	0	Contact Details for Margin Call, Credit Limit exceeded, Market Disruption and other Important Notices As a Borrower, you must provide at least one (1) preferred point of contact for Margin Call, Credit Limit exceeded, Market Disruption and other important notices (eac	ch
Notices	0	an 'Important Notice') that you personally monitor.	
> Communication	0	The Lender will attempt to send all important Notices to all the preferred points of contact you nominate below.	
Investment Details	0	An Important Notice will contain personal information such as the facility name and other identifying details and the shortfall amount or amount owing.	
Adviser to Customer	õ	Preferred point of contact	
Hand Over	-	* Email address or mobile phone number for SMS * Name of the Borrower (who will usually monitor	
Next Steps	0	this preferred point of contact)	_
		Add New Preferred point of contact	
			Mont

Investment details

In this section you are asked to provide details and instructions relating to:

- Investment information
- Investment parameters
- Dividends and distributions

	+) Login
Loan Requirements	Leveraged Online Application Form
Facility Details	✓ Investment Information
Investment Information Margin Loan Expected Investment	I want to refinance an existing loan (including stock transfer) from another provider
Parameters Dividends and Distributions	Will you be lodging codsing asseds? I will lodge some or all of my ASX listed securities with this Margin Loan
Next Steps O	☐ I will lodge some or all of my managed funds with this Margin Loan
	VWI you be applying for Managed Funds? I will be applying for managed funds with this Margin Loan
	▼Will you be nominating a Platform?
	Votion of Monthagoe
	Upon submitting an application to the Lender for a Margin Loan, each Borrower and Guarantor will also be taken to offer to grant to the Lender a separate mortgage over the Secured Portfolio on the terms of the Facility Terms and Conditions ("Offer of Mortgage"). The Lender can accept this Offer of Mortgage by:
	1. notifying the Borrower or the Guarantor that we have approved this application; 2. opening a Loan Account in the Borrower's name and noting the Guarantor in the records of the Lender as Guarantor on the Borrower's Margin Loan; or 3. In the case of a Guarantor being added subsequent to such opening, on noting the Guarantor in the tecords of the Lender as Guarantor on the Borrower's Margin Loan;
	and such acceptance, without further action by the Lender, creates a binding wortgage on the terms of the Facility Terms and Conditions.
	There are a number of additional featured products you can add to your Leveraged Equilies Margin Loan. You may select one or all of the following products.
	Revards Plus
	Short Plus

Adviser to client hand over

In this section you will have the opportunity to continue with the application, or hand it over to your client.

Leveraged The professional's choice	+) Login
Loan Requirements Borrower Details Facility Details Investment Details Adviser to Customer To you wish to hand over this application to be completed by the Customer? Yes Next Steps Client Details Email address Given name Last name	f you choose to hand
Back	Next

Next steps following hand over

If you have chosen to hand over the application to your client, you will be taken to the following screen which confirms the next steps.

	aged	
Next Steps	Ø	Leveraged Online Application Form
		Next Steps
		Your customer should receive an email from Leveraged Equities within 30 minutes. If they still haven't received it within this timeframe, please contact Leveraged Customer Service team on 1300 307 807, or customerservice@leveraged.com.au. Please note, emails can sometimes be directed to a customer's junk or promotions folder, and it's recommended that the customer checks these folders prior to
		contacting the Customer Service team. Once your customer has submitted the application, you will receive an email confirming the next steps.
		# Close

Identity verification

If you have selected to continue to complete the application form on behalf of your client, you will be required to provide certified copies of your client's identification.



Financial details

In this section you are asked to provide details and instructions relating to:

- Taxation information
- Credit limit
- Contribution
- Dependents
- Income and Commitments

Loan Requirements Borrower Details Facility Details Investment Details Investment Details Adviser to Customer Hand Over Collection of tax file numbers (TFNs) is authorised, and its use and disclosure are strictly regulated by the tax laws and Privacy // not compulsory but tax may be taken out of certain payments made to you at the highest marginal rate of taxation plus Medicare	
Loan Requirements Leveraged Online Application Form Borrower Details Investment Details Investment Details Taxation Information Adviser to Customer Hand Over Collection of tax file numbers (TFNs) is authorised, and its use and disclosure are strictly regulated by the tax laws and Privacy / not compulsory but tax may be taken out of certain payments made to you at the highest marginal rate of taxation plus Medicare	
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Investment Details Adviser to Customer Hand Over Customer Hand Over Customer Hand Over Customer Hand Collection of tax file numbers (TFNs) is authorised, and its use and disclosure are strictly regulated by the tax laws and Privacy A Details and Computing an exemption Collection of tax may be taken out of certain payments made to you at the highest marginal rate of taxation plus Medicare	
Adviser to Customer Hand Over Collection of tax file numbers (TFNs) is authorised, and its use and disclosure are strictly regulated by the tax laws and Privacy / not compulsory but tax may be taken out of certain payments made to you at the highest marginal rate of taxation plus Medicare	
This of claim an exemption.	Act. Quotation of your TFN is levy if you do not quote your
Financial Details * Would you like to provide your TFN or TFN Exemption details?	
> Taxation O Yes O No	
> Credit Limit	
> Contribution O Back	🖺 Save 🏼 🤿 Next
> Dependants O	
> Income - Borrower O	
> Commitments - O Borrower 1	
Supporting O	

Supporting documentation

In this section you are reminded of the supporting documentation required for assessment of the application. Most of the supporting documentation can be uploaded to the online application by adding or dragging the files into the relevant sections.

		→) Login
Loan Requirements	Leveraged Online Application Form	
Borrower Details		
Facility Details	▼ Supporting Documentation	
Investment Details	Each identification document must be certified by an acceptable certifier. Leveraged will not accept photocopies or electronic transmissions of a certification. For assistance of certified documents please read our identification Documentation and Certification Guide.	providing
Adviser to Customer Hand	Please send your certified ID documents, guoting your Application ID, to the address below.	
Financial Details	Leveraged GPD Box 5988	
Supporting Documentation	Sydney NSW 2001	
> Supporting Documentation	Based on the information you have entered, you will need to provide the following supporting documentation. Should you not upload the supporting documents here, you will r to us.	eed to post them
Confirmation	Nominated Account - Bank statement that shows the name of the borrower, BSB, account number, and name of financial institution	
	Two most recent paysips or two most recent full tax returns Two most recent paysips or two most recent full tax returns Most recent Portfolio statement for shares, managed funds, or bonds no older than 90 days that shows the institution, account name, current market value and list of all Most recent rental income statement(s) or tenancy agreement Most recent credit card statements for all credit cards. Statement must show name of the institution, account name and total approved limit.	securities held
	And Ellen Nominated Account - Bank statement	
	Add files and disp here Maximum allowed size per file is 2.0 GB.	
	Lodge ASX - Most recent Portfolio stutement	
	Citick to add files or drag and drop here Maximum attevet bits per file in 10.0 MB.	
	Lobe Manaded Funds - Lobe recent Particle statement	
	Citics, to add files or drag and drop here Mainsum allowed data per file in 16.0 MB.	
	Cash contribution - Most recent balls statement	
	Citick to add files or drag and drop here Macroun atread usin per file is 10.0 Mb.	
	Your two most recent paysigs or two most recent full tax returns	
	Click to add files or drag and drop here	

Confirmation

This section provides a summary of the information entered for final review. If all details are correct the application can be submitted. Alternatively you can amend details using the side navigation.

		ا (+	Login
Loan Requirements	Leveraged Online Application Form	1	
Borrower Details	Confirmation		
Facility Details	Application ID 5877		-
Investment Details			
Adviser to	Below is a summary of the details you have provided in thi	s application. Please check the accuracy of the information.	
Over	Once the application is submitted you will not be able	to make any amendments to the application. A conv of the below information will be	
Financial Details	provided to you via email upon submission, however v it be required.	we will store this information on your file, and a copy can be requested at a later date should	i -
Supporting Occumentation	Upon submitting, there are documents the customer w	ill need to sign and return to us. These will be emailed to the customer.	
Confirmation 📀	Welcome		
Next Steps O	Are you a New or Existing Client?	New	
	Which loan type would you like to apply for?	Margin Loan	
	How would you like the account to be set up?	An individual	
	Are you completing this application for yourself or on behalf of somebody else?	On behalf of somebody else	
	Loan Requirements		
	Borrower type	Borrower	

Next steps

Upon submision of the application you will be taken to the following screen which contains the Application ID.



Email confirmation and execution pages

You and your client will receive an email confirming the submission of the application. That email will also contain a copy of the application execution pages that need to be printed, signed and returned.



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Disclaimer

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