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

Leveraged™

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).

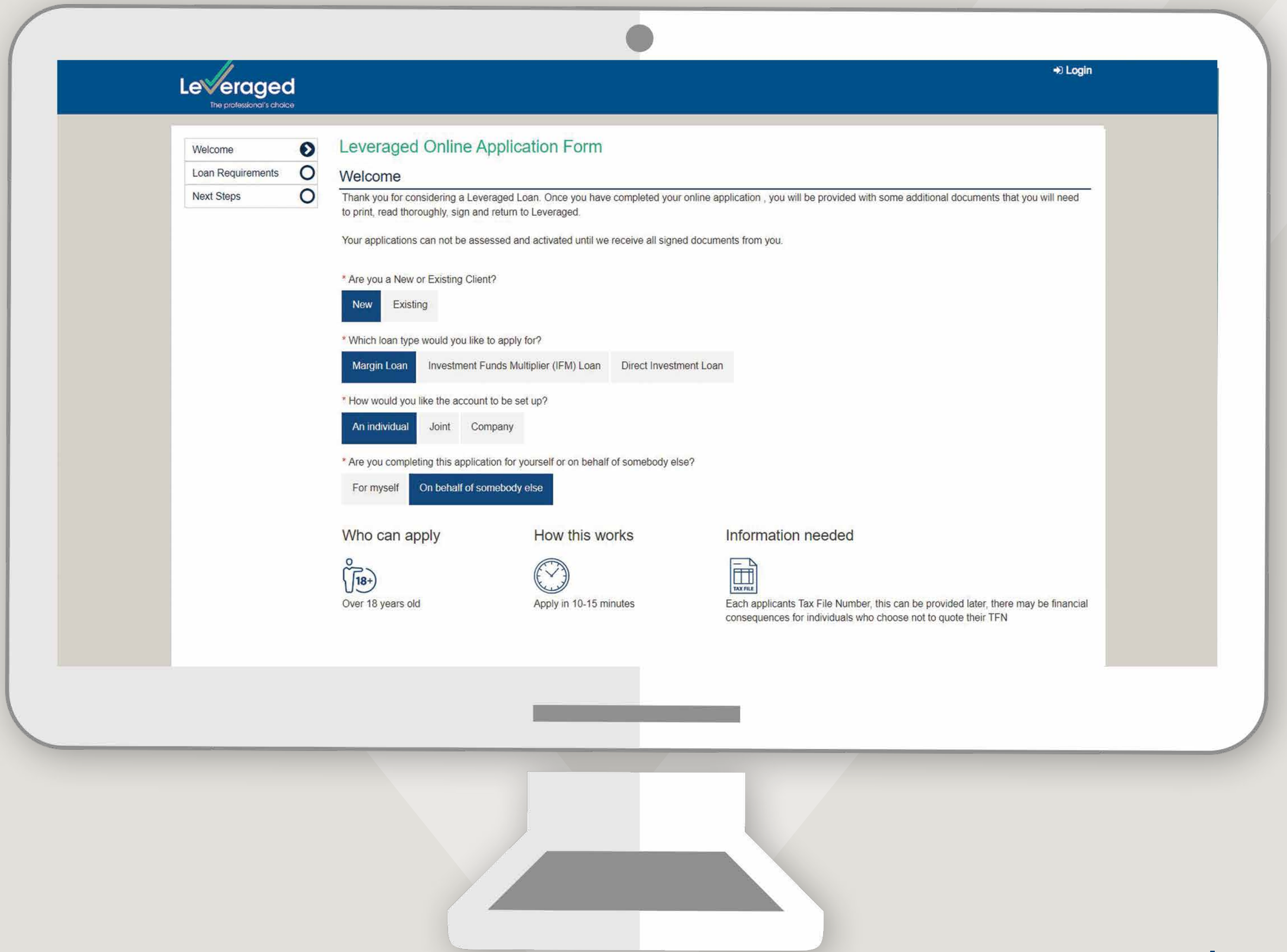
Who can apply?

- 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.
- 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

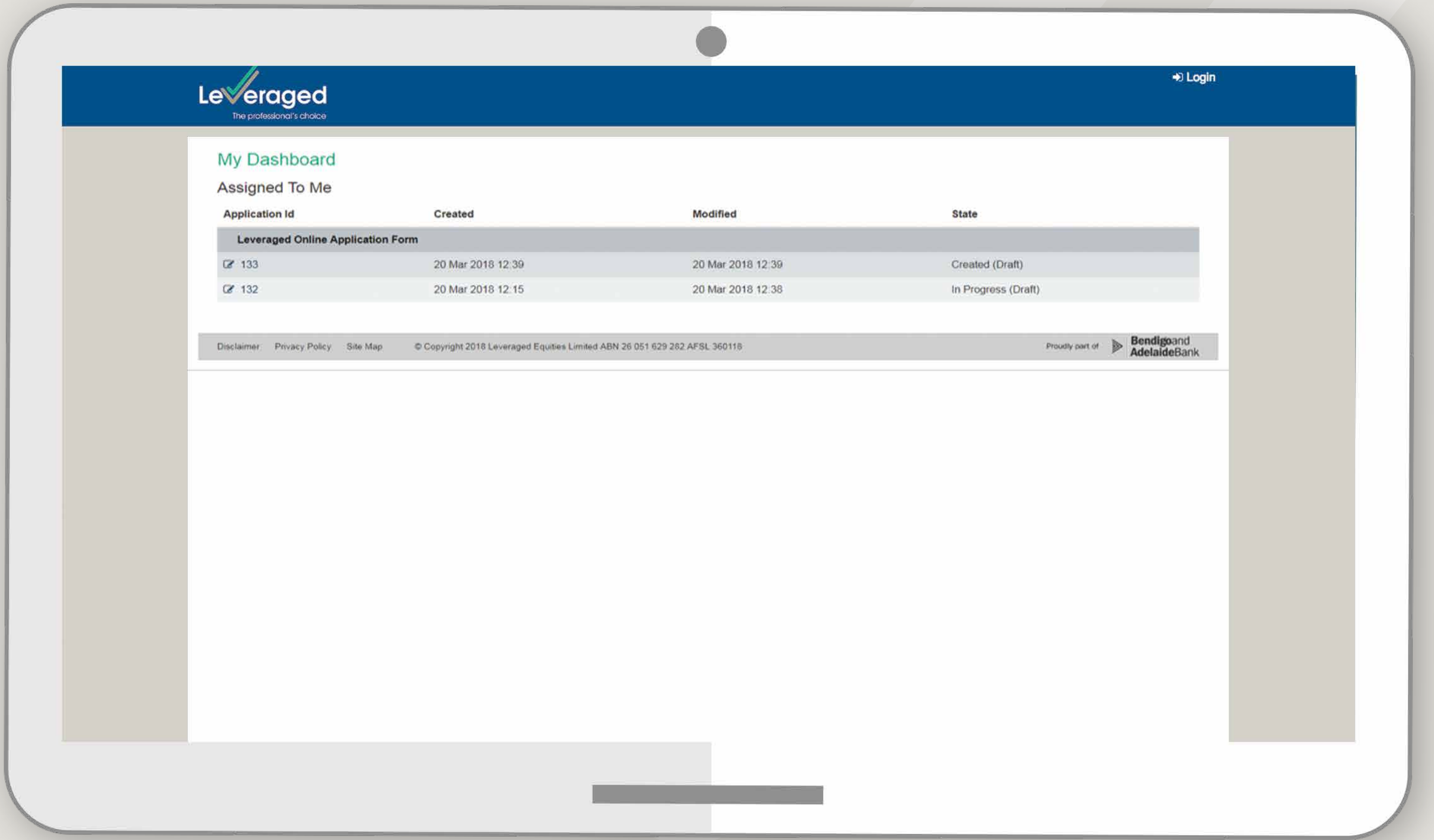


leveraged.com.au

Saving your application

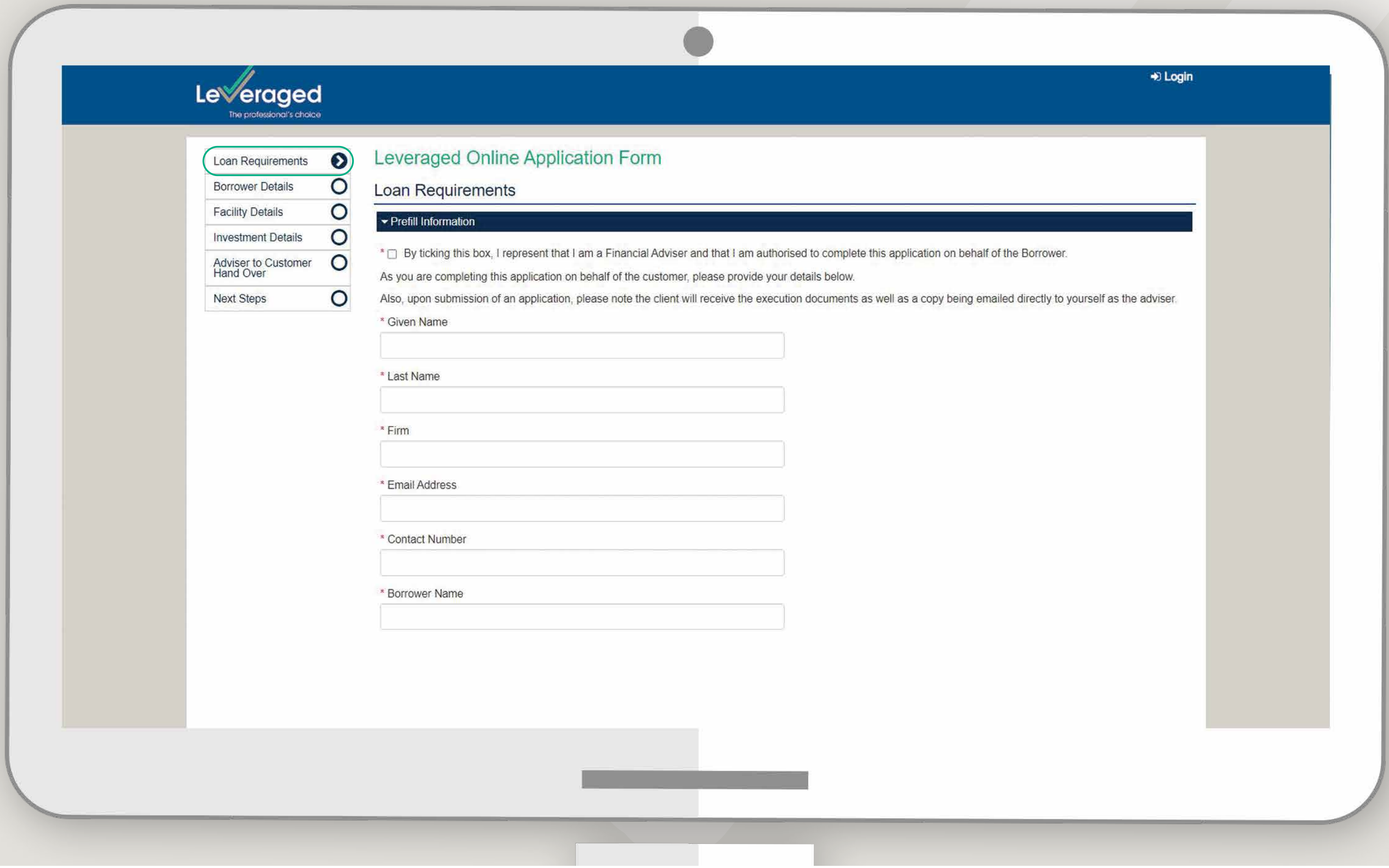
Your application will automatically start saving once you have entered your email address. You will be asked to create login details (or use your existing login details), which you can later use to retrieve your saved application.

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.



Loan requirements, adviser prefill information

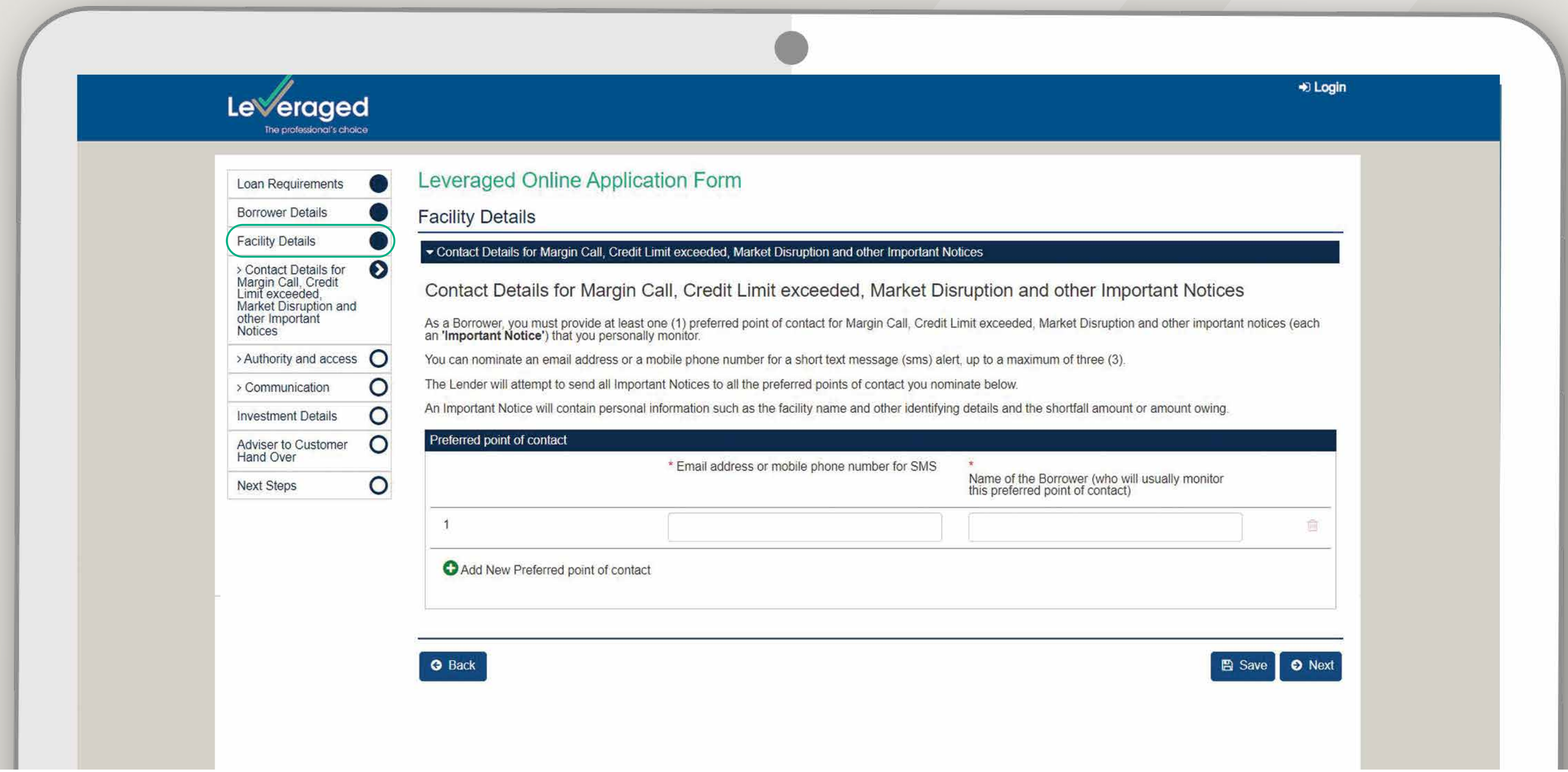
In this section advisers can commence to prefill the application on behalf of their clients.



Facility details

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

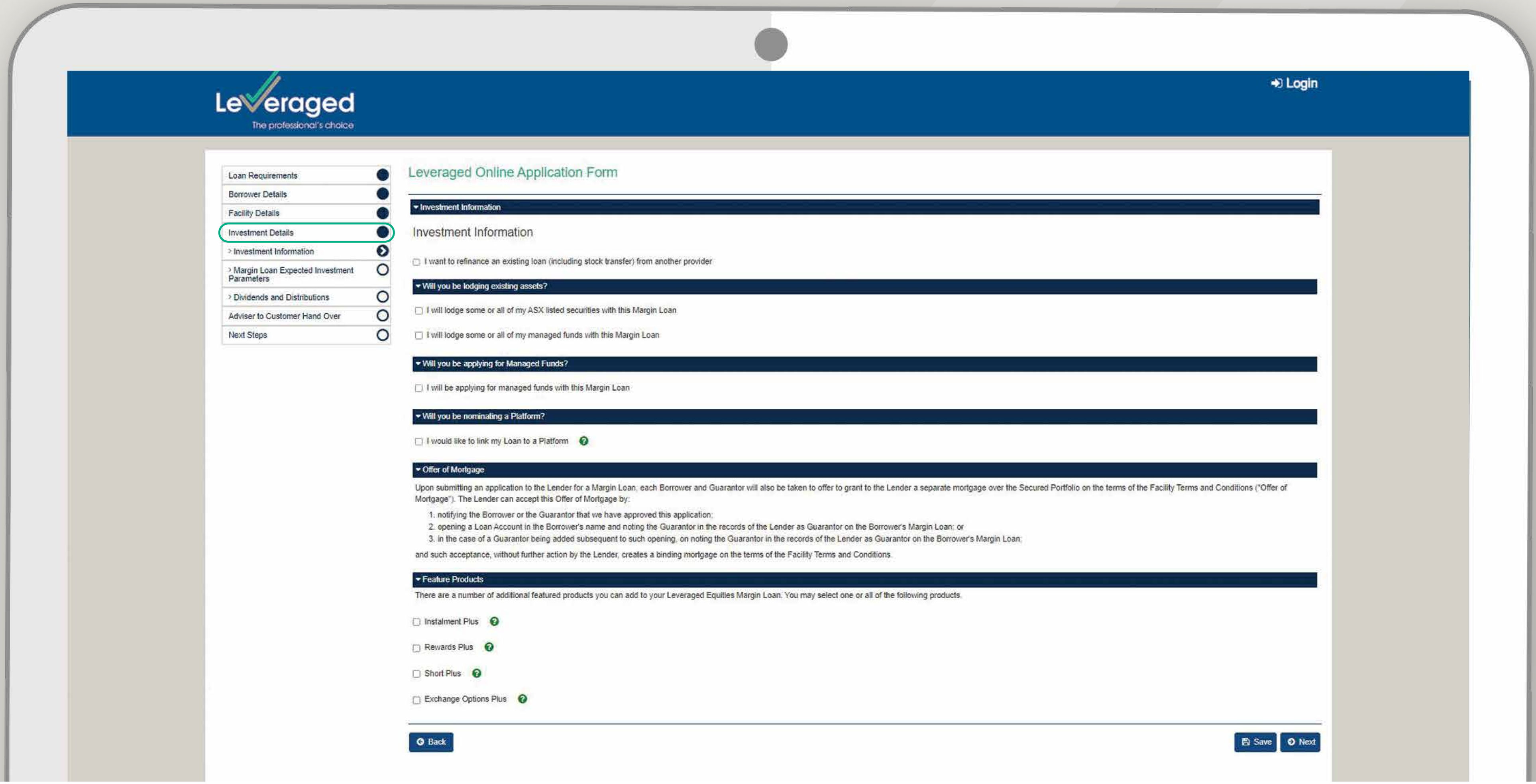
- Contact details for margin calls, credit limit exceeds, market disruptions and other important notices
- Account access and authority
- Bank Accounts
- Communications



Investment details

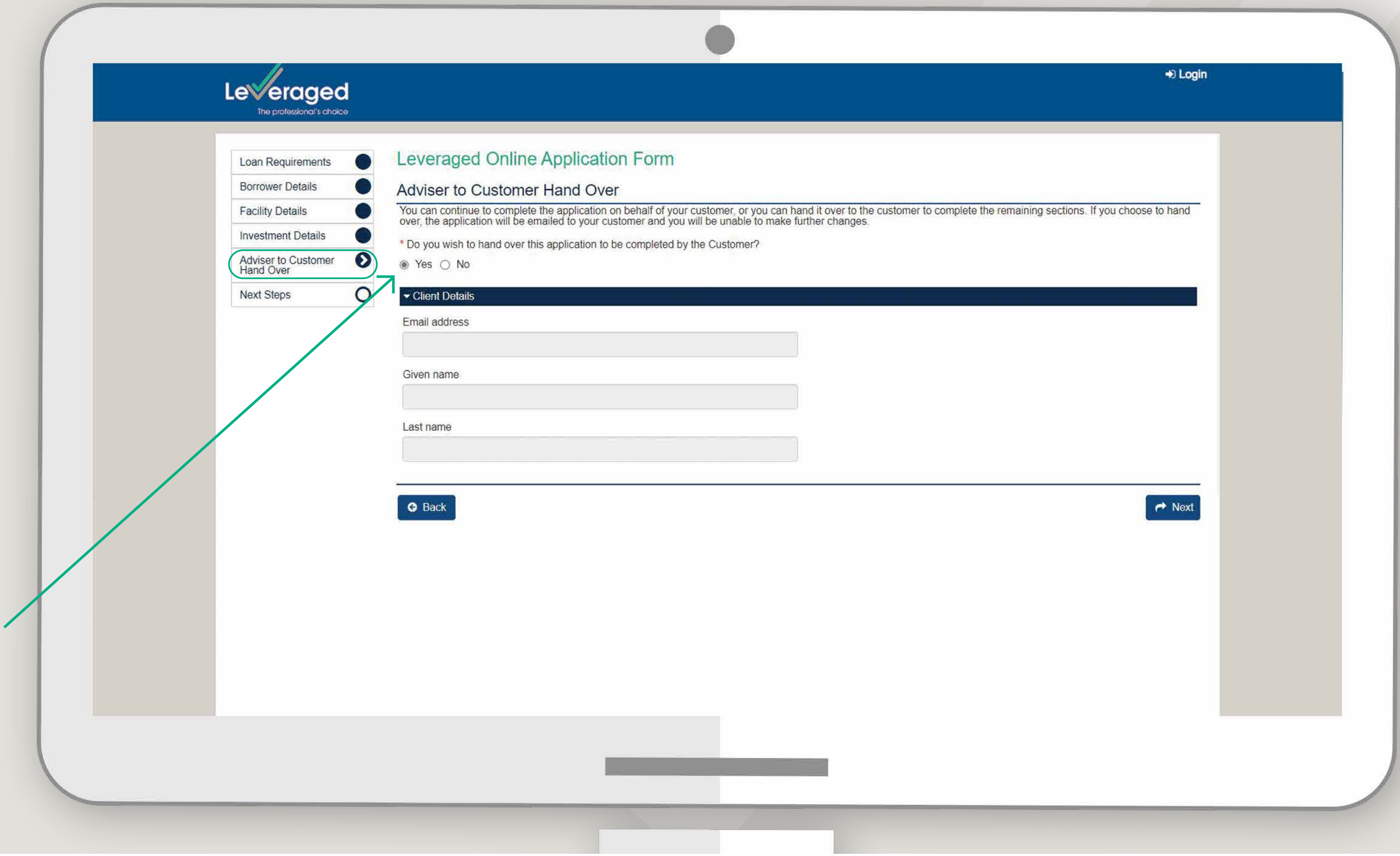
In this section you are asked to provide details and instructions relating to:

- Investment information
- Investment parameters
- Dividends and distributions



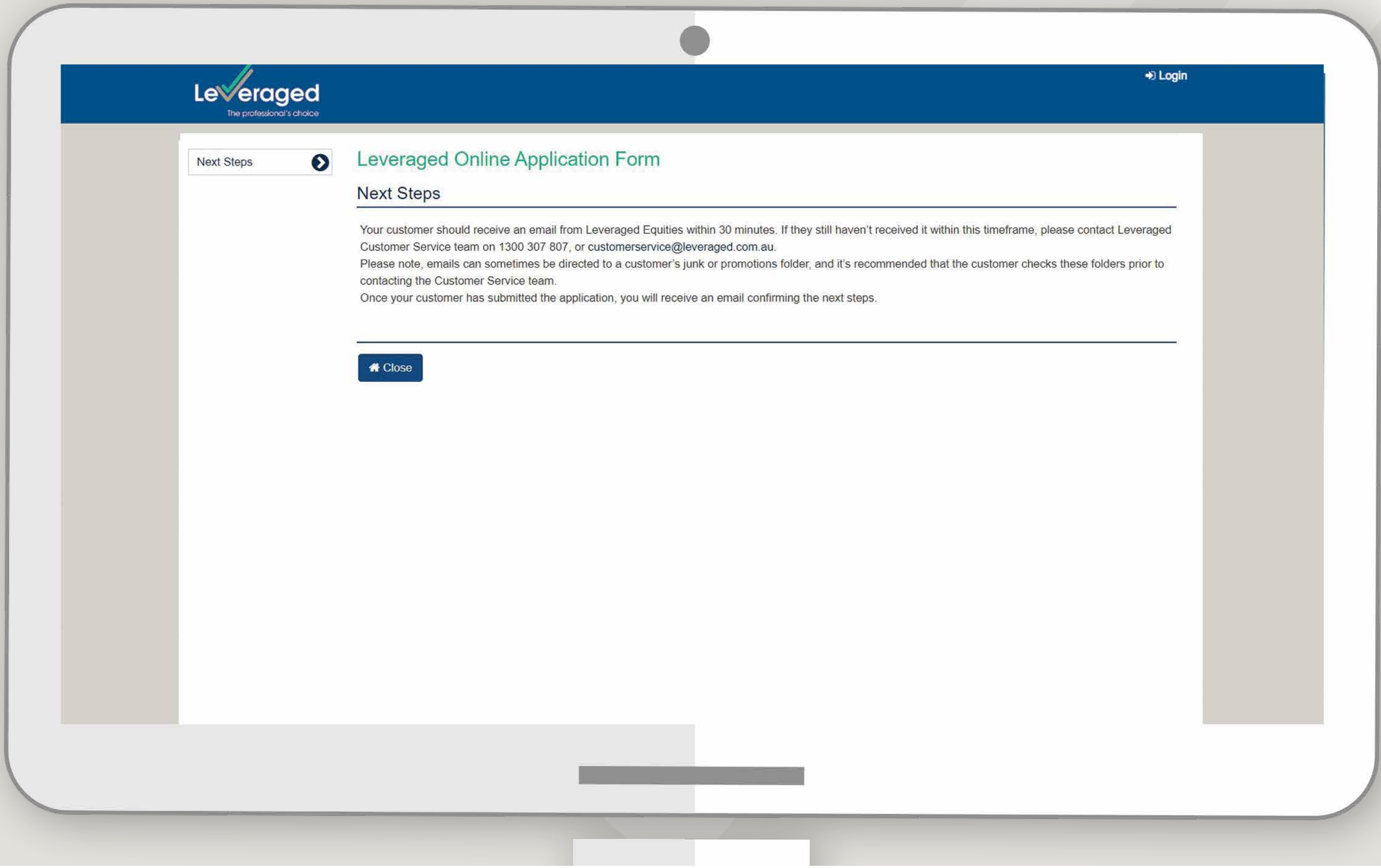
Adviser to client hand over

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



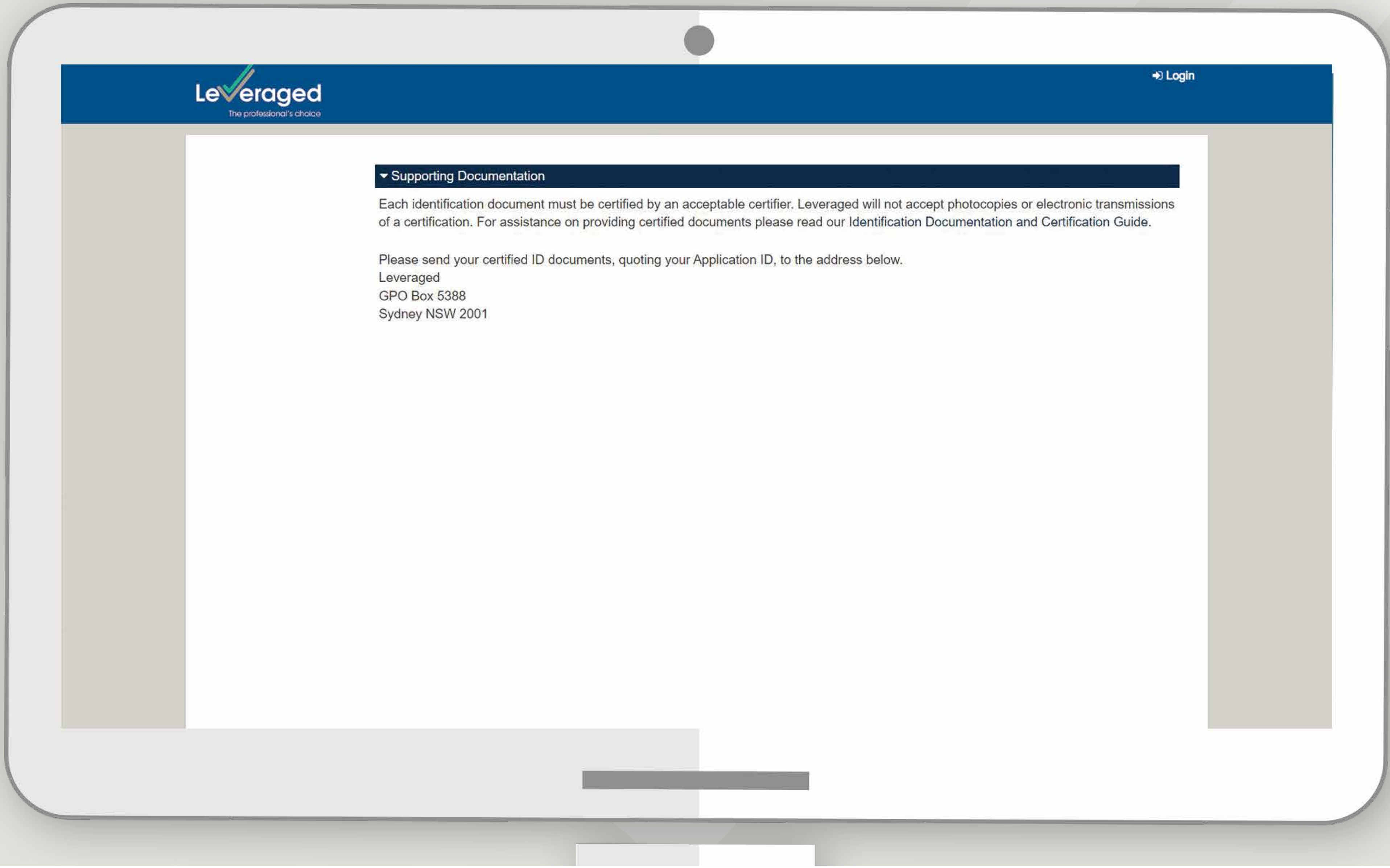
Next steps following hand over

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.



Identity verification

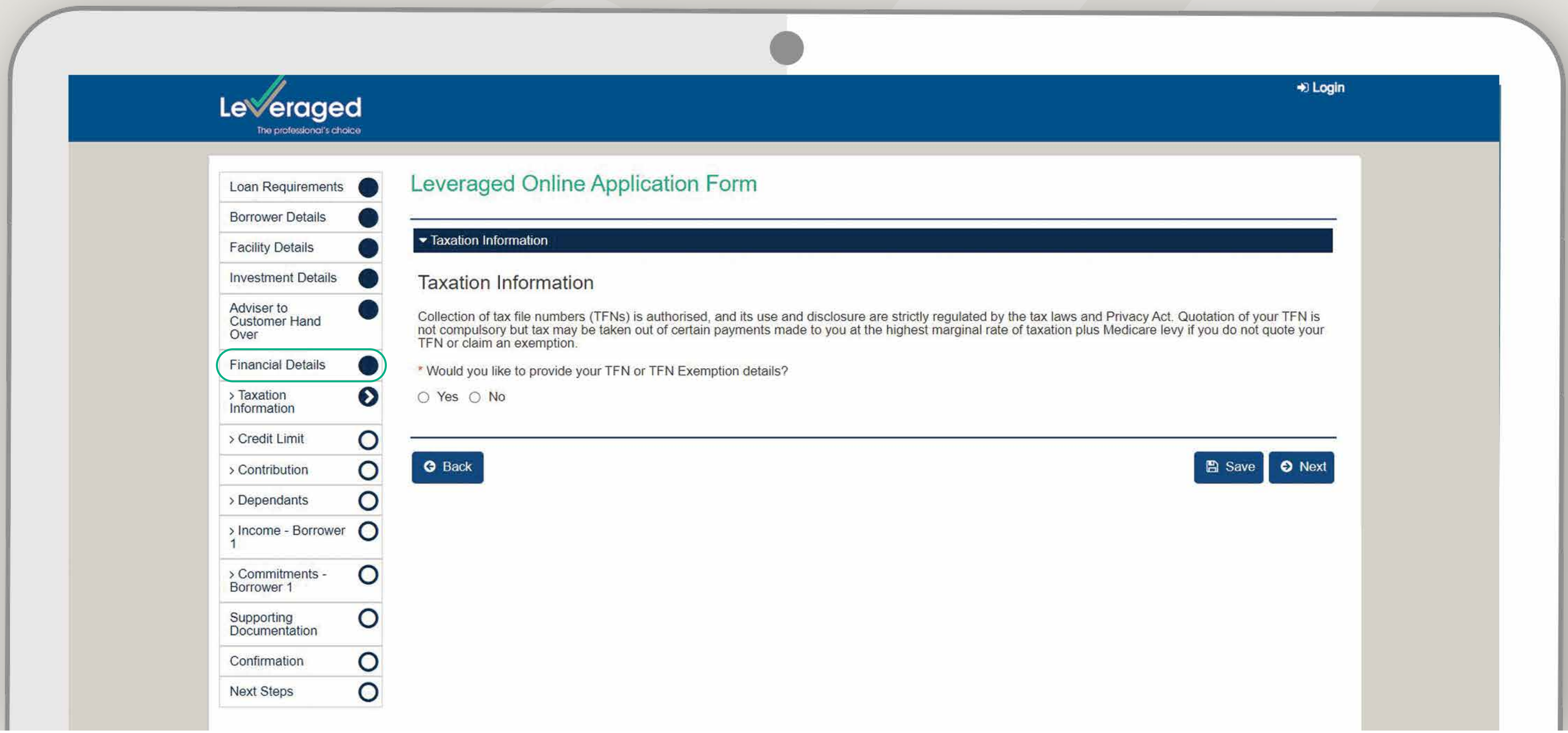
If you have selected to continue to complete the application form on behalf of your client, you will be required to provide certified copies of your client's identification.



Financial details

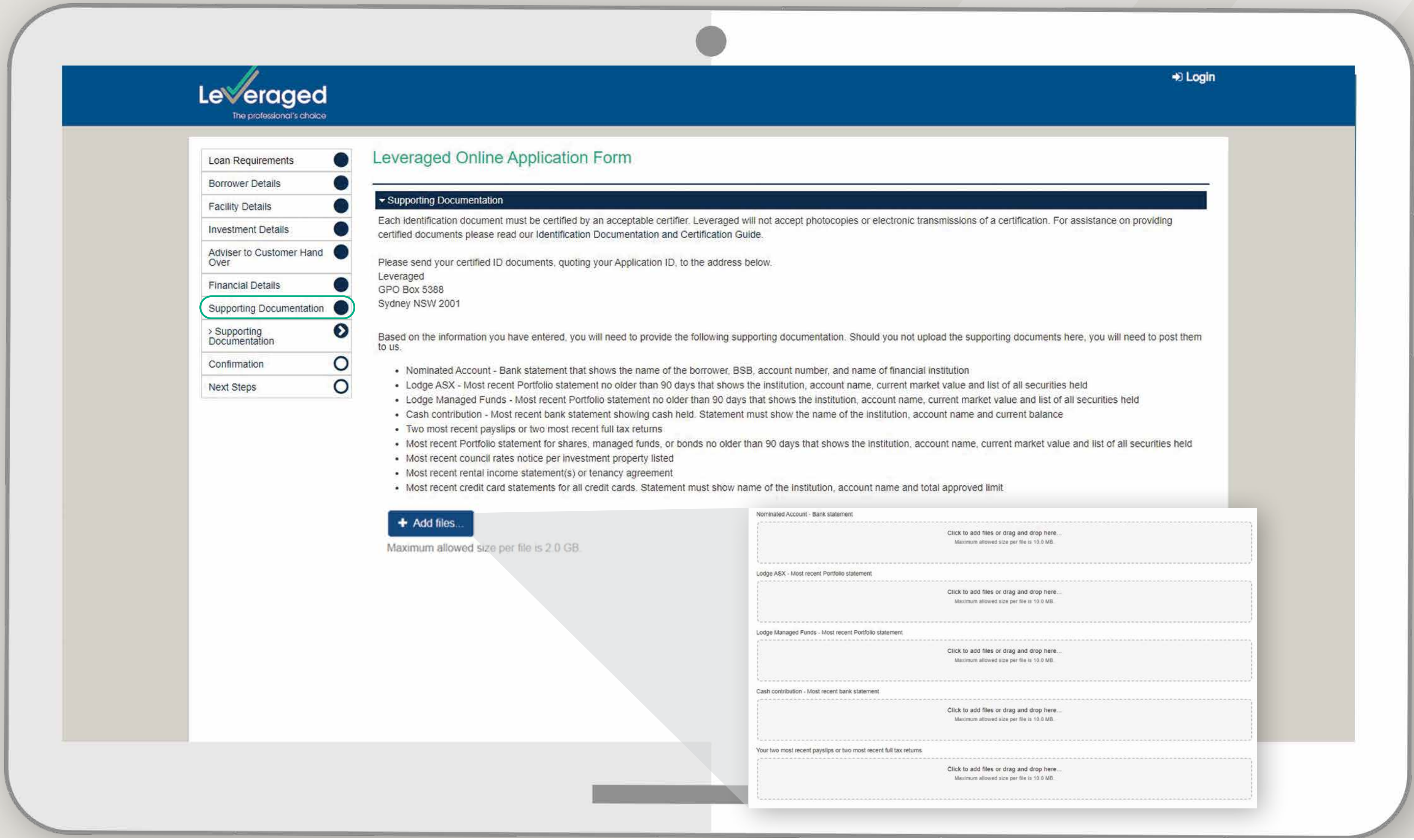
In this section you are asked to provide details and instructions relating to:

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



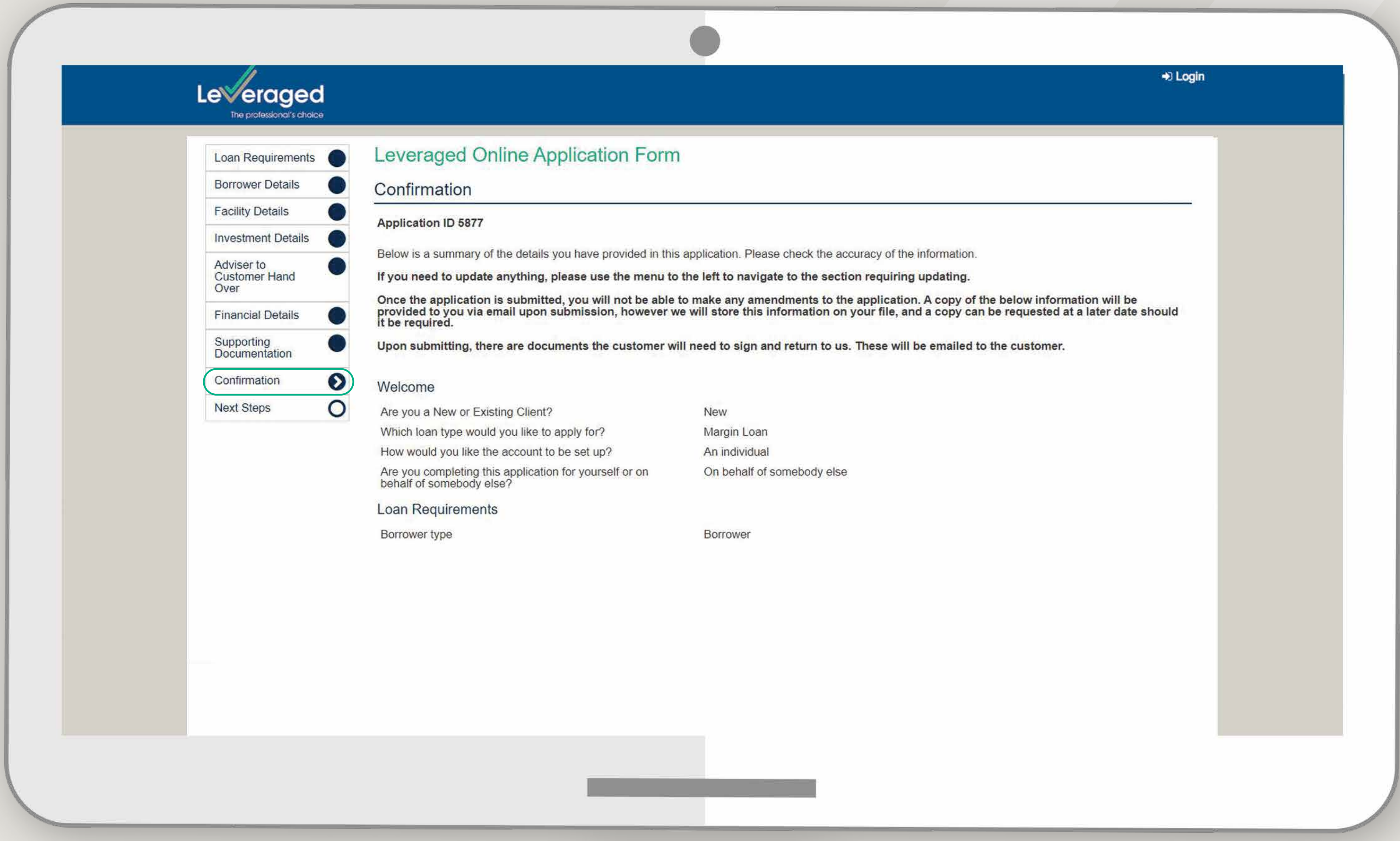
Supporting documentation

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.



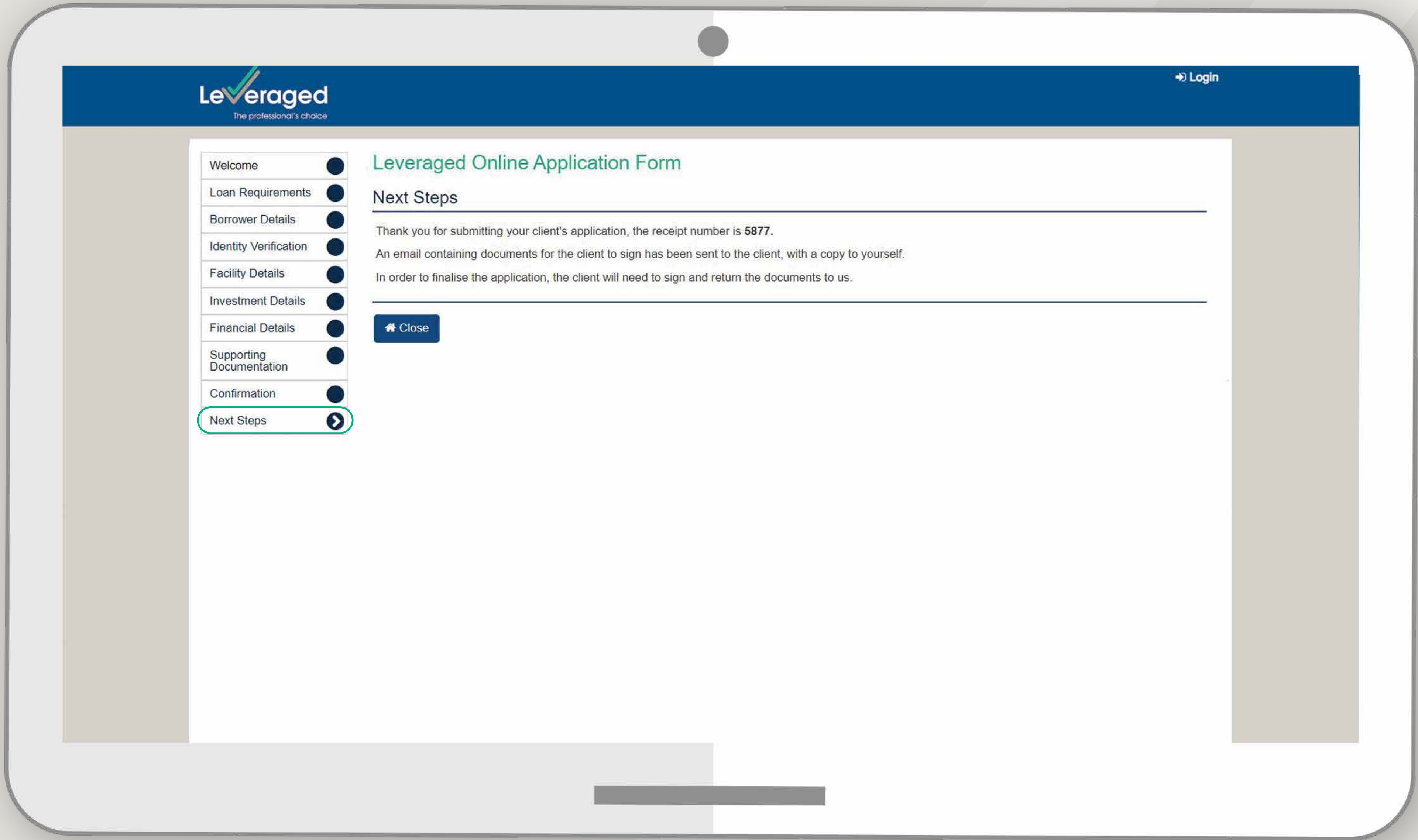
Confirmation

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.



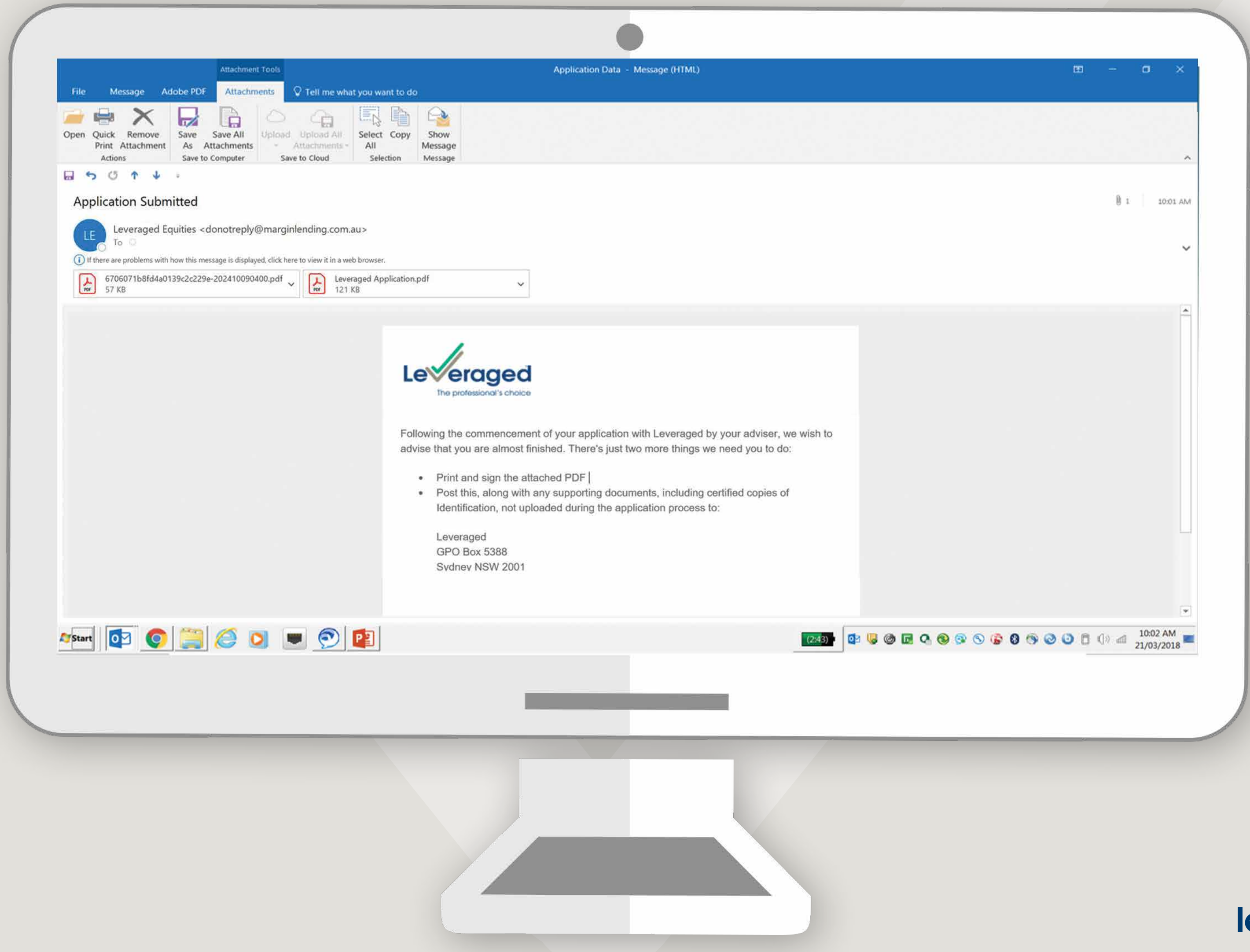
Next steps

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.



leveraged.com.au

Disclaimer

Issued by Leveraged Equities Limited (ABN 26 051 629 282 AFSL 360118) as Lender and as a subsidiary of Bendigo and Adelaide Bank Limited (ABN 11 068 049 178 AFSL 237879). This information is correct as at 10 October 2024 and is for general information purposes only. It is intended for AFS Licence Holders or authorised representatives of AFS Licence Holders only. It is not to be distributed or provided to any other person.