

A summary of the process flow when applying for a Leveraged Equities Margin Loan or Investment Funds Multiplier and North Investment account.

Should you have any questions, call your Leveraged Relationship Manager on 1300 307 807.

Step 1	Step 2	Step 3	Step 4	Step 5
<p>Leveraged online application</p> <p>Complete the Leveraged online at www.leveraged.com.au/apply-now</p>	<p>North and Managed Fund applications</p> <p>Your clients will also need to complete:</p> <p>North Investment online application form</p> <p>Visit northonline.com.au to complete this form, which will create a new form called Investment account information (for Leveraged). Have your client complete and sign this form.</p> <p>Managed Fund application forms</p> <p>Have your client complete and sign these forms if investing in managed funds.</p>	<p>Email documents</p> <p>Email completed and signed documents, including supporting documents to your BDM or Relationship Manager:</p> <p>Leveraged GPO Box 5388 Sydney NSW 2000</p> <p>Check that you have included:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Leveraged application form (completed, signed, witnessed, with supporting documents) <input checked="" type="checkbox"/> North Investment application form (completed, signed) <input checked="" type="checkbox"/> Managed Funds application form (completed, signed) 	<p>Assessment</p> <p>Applications are assessed and where approved, Leveraged will contact the Borrower(s) and Guarantor(s) to activate the loan facility. Once the facility is activated Leveraged will send the North application form and Managed Funds application forms to North.</p>	<p>Activate</p> <p>You can now go to northonline.com.au to activate the North Investment account.</p>