North process flow



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

Leveraged online application

Complete the Leveraged online at www.leveraged.com.au/ apply-now

Step 2

Fund applications

Your clients will also need

North Investment online

Visit northonline.com.au

to complete this form,

which will create a new

form called Investment

account information (for

client complete and sign

Managed Fund application

Have your client complete

and sign these forms if investing in managed

Leveraged). Have your

this form.

forms

funds.

to complete:

application form

North and Managed Ema

Email documents

Step 3

Email completed and signed documents, including supporting documents to your BDM or Relationship Manager:

Leveraged GPO Box 5388 Sydney NSW 2000

Check that you have included:

- Leveraged application form (completed, signed, witnessed, with supporting documents)
- North Investment application form (completed, signed)
- Managed Funds application form (completed, signed)

Step 4

Assessment

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.

Step 5

Activate

You can now go to northonline.com.au to activate the North Investment account.

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