

Broker Accreditation Attestation

Transfers and Multi-Product Accreditation

Thanks for your interest in updating your accreditation with us. To apply for a transfer or multi-product application, please complete this application form. If completing a bulk transfer, please reach out to the Accreditation Team, they will provide you with the bulk transfer attestation form.

1. Current Broker Details *(Aggregator to complete)*

Macquarie ID:

Broker Code:

Broker First Name:

Broker Surname:

DOB:

Email Address:

Mobile Number:

Business Number:

Business Address:

Entity Name:

Trading Name:

ABN:

ASIC Licence Type (please provide relevant supporting documents, depending on the licence type):

ACL in Brokers Name

CR in Company Name

Employee of ACL Holder

Director of ACL

CR of Aggregator ACL

CR of 3rd Party ACL holder

ACL (if relevant):

ACR (if relevant):

2. Aggregator Attestation (*Aggregator to complete*) (continue)

2.1 Is the broker looking to complete a transfer or multi-product accreditation?

Transfer Multi-Product

2.2 If applying for a multi-product accreditation, which product accreditation is the broker seeking to add on to their existing accreditation?

Home Loan Commercial

If adding commercial accreditation, please also complete section 5. Please note, you may also be required to complete training for the additional accreditation.

2.3 What current industry body membership does the broker have?

MFAA FBAA CAFBA

3. Broker Attestation: Pre-qualification (*Broker to complete*)

3.1 Have you ever been banned or disqualified by ASIC or an industry body?

Yes No

3.2 Have you ever been declared bankrupt, subject to a debt agreement (Part IX or X) or been subject to control under the Bankruptcy Act 1966?

Yes No

4. Broker Attestation: Lendor History, Personal Credit History, Police Check (*Broker to complete*)

4.1 Have you ever had your accreditation terminated by a lender on adverse grounds?

Yes No

If Yes, please provide an explanation

4.2 Are any of your personal accounts more than 30 days overdue?

Yes No

If Yes, please provide a Credit Report dated within 90 days

4.3 Have you had any financial defaults in the last 12 months?

Yes No

If Yes, please provide a Credit Report dated within 90 days

4.4 Do you have any records or disclosable court outcomes on your criminal record (police check)?

Yes No

If Yes, please provide a Police Report dated within 90 days

5. Broker Attestation: Commercial Experience *(Broker to complete if applying for Commercial Multi-Product Accreditation only)*

If you're applying for a Commercial Multi-Product Accreditation, complete the below questions and provide your resume.

5.1 Describe your commercial lending capability and experience in both years and employers?

5.2 Who is your target market and what industries do your clients operate in?

Select from below options. Please note, we do not offer SMSF, rural or agribusiness, construction, or development finance

Professional business services (e.g. accounting & financial services, insolvency, insurance, legal, etc)

Business lending (e.g. building, education/community, health, technology, etc)

Property services (e.g. real estate, strata, etc)

Commercial property finance (e.g. industrial, office, retail, boarding houses, childcare, etc)

Other, please note

5.3 How do you source your commercial clients and what is your process around mandating clients?

5.4 Please provide some details on your current volume and lenders you deal with.

Lender:

Volume of applications per annum:

Reason for using that lender:

Lender:

Volume of applications per annum:

Reason for using that lender:

Lender:

Volume of applications per annum:

Reason for using that lender:

5.5 What is your proposed annual volume to Macquarie?