

# REFERRAL STEPS

1



## Identify

Identify an opportunity to refer your client to Westpac.

2



## Permission

After seeking permission to pass on your client's contact details, complete the digital Online Referral Form.

3



## Appointment

Within 1 business day, a dedicated Westpac Lender will get in touch with your client to arrange an appointment.

4



## Solutions

During the appointment, our Westpac Lender will look at your client's banking and lending requirements, offering possible solutions to meet their requirements and objectives.

5



## Updates

Our Lender will keep your client updated throughout their journey, and provide you with general status updates.

6



## Commission

Once your client's loan is approved and settled, the commission payment will be made on the 22nd day of the following month. Your monthly commission statement will show payments made for each settled loan.



We'll continue to support your client with any future banking needs.

