



HOME LOANS STEP BY STEP

START



DISCOVERY CALL. 15-minute phone call to ensure that we are the right team to partner up with in pursuit of your goals, and to help us understand your financial and lifestyle goals.



FACT FIND. A 30-minute phone call to gain a deeper understanding of your current financial situation. The better the information we gather in this phone call, the better the results we will get you.



FINANCE STRATEGY. Once we have completed our Finance Strategy, our team will present it to you and discuss next steps for you to take in pursuit of your financial and lifestyle goals.



MARKET RESEARCH. With all the information needed, we will conduct an in-depth analysis of the current financial situation and provide you with a Financial Strategy that clearly articulates the best solution for your financial and lifestyle goals.



ITEM CHECKLIST. On acceptance of our Finance Strategy, our team will prepare a checklist of items required to lodge your application to the relevant lenders. Once these items are here, we will prepare your application for submission.



PACKAGE SUBMISSION. Our structured system will prepare your application to your lender. This will ensure your application is presented in the best light and achieve the highest chances of success in the shortest time frames possible.



FORMAL APPROVAL. Success! Once all bank assessments have been met and their lending criteria satisfied, a formal approval will be issued. We will forward this approval to you along with our congratulations.



BANK ASSESSMENT. Our Team will liaise between the banks assessors, yourself as our client and all other parties involved to ensure we secure your pre-approval, conditional approval and formal approval in a swift and timely manner.



LOAN DOCUMENTS. Post formal approval, loan documents will be issued. These loan documents will need to be signed and returned to the lenders legal team. We work with you to ensure these are certified in a timely manner and a swift settlement for your finance follows.



SUCCESSFUL SETTLEMENT. Congratulations, your finance is now settled! Our team will work with you to ensure your banking is structured correctly and outline a plan for your new on-going financial commitments.



ON-GOING SERVICE. Our service doesn't stop on the settlement of your loan. We conduct periodic loan reviews to ensure that your loan structure remains optimised to meet your lifestyle.



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