



Latitude Broker

Broker Application for Individual Accreditation

Application for accreditation for the introduction of:

Motor Loans

Personal Loans

In order to comply with requirements of Latitude Financial Services for the introduction of motor loans and personal loans, the following documentation and information must be provided.

Once completed, please email this application (pages 1-6), together with all supporting documentation, to the Latitude Financial Services Broker Accreditation Department on central.accreditations@latitudefinancial.com.

Please be aware that Latitude will not process your application if either an incomplete application or incomplete documentation is correctly sent to the Latitude Broker Accreditation Department.

Approval of this application will not occur until all relevant training requirements (details of which will be distributed separately) are completed successfully.

The required Broker training modules will be sent to the Brokers supplied email once this form is processed within 48 hours.

Broker codes will be emailed to Broker supplied email within 24 hours of all training being completed successfully.

This application is subject to the Broker or Originator having or operating under an existing agreement with Latitude Personal Finance Pty Ltd authorising the Broker or Originator to introduce personal loan applicants, an agreement with Latitude Automotive Services authorising the Originator to introduce motor loan applicants or both.

For more information, you can call our Broker Support team on **1800 035 902** or email them at broker.support@latitudefinancial.com or visit www.latitudefinancial.com.au/broker.

CHECKLIST

Please ensure the following items have been provided together with this application form prior to faxing to Latitude Financial Services for appraisal:

- A completed Application form
- A clear and legible copy of your Driver's licence or Passport (photo page)
- Email address suitable for training purposes has been provided (page 2)
- You have signed page 4
- Schedule 1 (page 5) has been completed
 - **Option 1: You hold an Australian Credit Licence (ACL)** - Note your ACL number
 - **Option 2: You have been appointed as an Authorised Credit Representative (ACR)** - Note the ACR details of both yourself and your employer (where your employer is not the ACL holder) and the ACL you are working under
 - **Option 3: You are a Director or Employee of a Credit Licensee** - Note the ACL you are working under and ensure a Director of ACL holder has signed
- A person whose signature has been provided to Latitude as an authorised signatory of the Originator has signed page 5

APPLICATION – ALL FIELDS MANDATORY (Please print in CAPITAL LETTERS)

Originator (Latitude Contract holder/Aggregator)

(Representative of Originator to endorse on page 5)

PERSONAL DETAILS

Title	First Name	Middle Name	Surname	Date of Birth (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Office Address (No PO Boxes)

Street		
Suburb	State	P/code

Office Number

Fax Number

Mobile Number

Business Email Address

EMPLOYMENT DETAILS

Company Name (as Registered with ASIC)- If acting as trustee include name of Trust

ACN

Trading Name (If different to Company Name)

ABN

TRAINING

Before we finalise your accreditation you will be sent and need to complete an online training module within 48 hours. Once you have passed this module we will finalise your accreditation within 24 hours.

To create your training account we require an email address that only you can access. If you do not have exclusive access to your business email we will require a personal email address to be able to assign the training.

I have exclusive use of the business email address listed above;

OR

Personal Email Address (to be used for training purposes only)

IMPORTANT NOTE

You should read the following Privacy Notice carefully as it sets out how Latitude may deal with your personal information.

Privacy Notice

In this Privacy Notice:

'Latitude' means all members of the Latitude Group of companies in Australia, including, without limitation: Latitude Automotive Financial Services Pty Ltd ABN 80 004 187 419 and Latitude Personal Finance Pty Ltd ABN 54 008 443 810, 572 Swan Street, Richmond, VIC 3121 trading as Latitude Financial Services

'Accreditation' means accreditation by Latitude under its internal "Know Your Intermediary" process for business accreditation of intermediaries it deals with.

'Agreement' means an Agreement with Latitude which authorises you or an Introducer for whom you work to introduce applicants for certain finance products to Latitude or to undertake other duties on behalf of Latitude.

'Applicant' means the person named as the Applicant in Schedule 1 of this Notice.

'Application' means an application by the Applicant for the Accreditation.

1. Consent to the use of my personal information in connection with the Application

By applying for the Accreditation I am and will be disclosing personal information about me to Latitude. I agree to the Introducer listed in Schedule 1 providing personal information about me to Latitude. I acknowledge that some or all of this personal information, and any other personal information Latitude collects about me, ("my personal information") will or may be used by Latitude to assess the Application for the Accreditation, and if the Application is approved, for the subsequent administration of the arrangements and agreements that will apply following the Accreditation.

I consent to Latitude using and disclosing my personal information for this purpose and acknowledge that without this information Latitude may be unable to consider my application for the Accreditation, and to perform necessary administrative tasks following my Accreditation.

2. Disclosure and collection of my personal information

I understand that Latitude may share my personal information, and any other information they collect about me, with each other and with the Introducer named in Schedule 1; other financial institutions and credit providers; service providers; other entities to whom Latitude (or any of its related companies) is required by law, or authorised by me, to disclose my personal information. Subject to the Privacy Act 1988 (Cth) including the amendments in the Privacy Amendment (Enhancing Privacy Protection) Act 2012 (Cth) (the "Privacy Act") and the Australian Privacy Principles contained within it and the other terms of this Notice, I consent to any such disclosure and collection regardless of how or when that information was collected.

3. Transfer of information overseas

I agree to the transfer of my personal information by Latitude to organisations overseas, but only for use in connection with any purpose that Latitude is authorised by this Notice or the Privacy Act. Whilst I understand that it is not practicable to list every country in which such recipients are located, it is likely that the countries to which my personal information may be disclosed include China, Hungary, India, Japan, Mexico, New Zealand, Philippines, Poland, Singapore, South Korea, Spain, United Kingdom and the United States of America.

4. Access to information

Subject to the provisions of the Privacy Act, I acknowledge that I may have access to my personal information collected and held by Latitude. I acknowledge that I can enquire of Latitude as to the identity of each related company of Latitude and may contact Latitude for access to my personal information by writing to "The Privacy Officer" at Latitude Personal Finance Pty Ltd ABN 54 008 443 810, 572 Swan Street, Richmond, VIC 3121

5. Complaints and correction of information

I acknowledge that I may raise a concern about the handling of my personal information by contacting Latitude on 1300 369 340 or at 572 Swan Street Richmond 3121. I also acknowledge that if I believe that any information which Latitude holds about me is incorrect that I may contact Latitude on +61 3 9921 6522 (then press 5) or write to Latitude at 572 Swan Street Richmond 3121 to have the information corrected. I note that further information about the handling of my personal information may be found in the Privacy Policy at <https://www.latitudefinancial.com.au/privacy>.

DECLARATION BY APPLICANT

I wish to perform the services contemplated by the Agreement with respect to certain financial products (**Services**).
I have read and now agree and consent to the matters set out in this application.

- 1) I confirm that the information contained in this Application is complete and correct and truly represents my position at the time of signing the Application.
- 2) I acknowledge and agree to the matters set out in the Privacy Notice which sets out how Latitude Financial Services collect, use and disclose my personal information.
- 3) If Licensed in my own right, I confirm that I hold and will continue to maintain status as:
 - a) Certified Credit Adviser/Credit Adviser/Associate Credit Adviser/Accredited Mortgage Consultant through MFAA, or
 - b) Accredited Member/Associate Member of the FBAA, andthat I am and will continue to be a member of an ASIC approved EDR scheme.
- 4) I acknowledge that, except as described in (5), below, I have no authority to act as Latitude Financial Services agent or in any way act on Latitude Financial Services behalf and that my appointment as a Broker is an appointment made solely by the Introducer named in Schedule 1.
- 5) I understand that I will, at Latitude Financial Services request (and in each case subject to the express terms of its request), be its agent when
 - a) Performing a statutory obligation on Latitude Financial Services behalf;
 - b) Giving a pre-contractual disclosure document to a prospective customer
 - c) Identifying and/or verifying the identity of a prospective customer in accordance with Latitude Financial Services Instructions and Policies and Procedures: and
 - d) Obtaining a required privacy consent from the prospective customer

Applicant Name

Signature

X

Dated DD/MM/YYYY

SCHEDULE 1 – TO BE COMPLETED

NCCP Licensing requirements for applicants

Applicants may only be accredited with Latitude to engage in credit activities if they:

1. have been issued with an Australian Credit Licence (ACL); or
2. have been appointed as an Authorised Credit Representative (ACR) by an entity that has been issued with an ACL; or
3. are a director or employee of an entity that has been issued with an ACL (Director of Licensee must sign to confirm)

1: Applicant is Licensed in their own name

Australian Credit Licence Number

2: Applicant is an Authorised Credit Representative

Authorised Credit Representative Number of individual

Authorised Credit Representative Number of Employer

Australian Credit Licence Holder Name

Australian Credit Licence Number

3: Applicant is a Director or Employee of a Credit Licensee

Australian Credit Licence Holder Name

Australian Credit Licence Number

Signature of director of Australian Credit Licensee

Name of Director of Australian Credit Licensee

CONFIRMATION FROM ORIGINATOR

Originator

A: We confirm that the applicant is affiliated under our Aggregation and has completed all necessary accreditation as stipulated by Latitude.

B: We confirm that the Applicant has appropriate policies & procedures to comply with obligations under the National Consumer Credit Protection Act 2009 (National Credit Act) regime, including Responsible Lending

C: We will inform Latitude immediately if the applicant is no longer affiliated under our aggregation so that the applicant's accreditation can be cancelled or transferred

Name of person authorised to sign on behalf of Originator

Position

Signature

NOTE: Person signing must be either a director or a person whose details have been provided to Latitude as an authorised signatory of the Introducer.

EMOTOR USER RESPONSIBILITIES (Motor Only)

eMotor User ID

Acknowledgement of Conditions (Individual) - eMotor User ID

By providing you with an eMotor User ID and password, Latitude Automotive Financial Services ABN 80 004 187 419 (Latitude Financial Services) authorises you to access its eMotor system via the Internet (Access). Access is at all times subject to the following conditions:

You agree to:

- lock your computer terminal with which you access any Latitude Financial Services system with a password screen saver if you leave your terminal unattended; and
- complete the logoff process and close your browser at the completion of every session connected to Latitude Financial Services systems.

You agree NEVER to:

- reveal your password(s) to ANYONE; or
- circumvent authorised Latitude Financial Services logon and logoff procedures.

You agree that:

- You will not allow any other person to possess or use your eMotor User ID or password;
- You will protect your eMotor User ID and password from loss and theft;
- You will not store your eMotor User ID or password on or with any computer terminal; and
- You will contact GE Money directly as soon as you no longer require access to Latitude Financial Services systems due to cessation of your employment or otherwise:
- You will be responsible for ALL content submitted under your eMotor User ID.

You agree that Latitude Financial Services may:

- revoke your access at any time without notice; and
- take appropriate action if any of the above conditions are breached, including without limitation, revoking your personal accreditation (if any) with Latitude Financial Services.

ACKNOWLEDGEMENT

I have read and now acknowledge: My eMotor User ID conditions and responsibilities

Name

Signature

Mother's Maiden Name (required for password changes to eMotor)

Date

___/___/___

CONFIRMATION FROM SUB-ORIGINATOR

I confirm that the above applicant is an employee of my business and I grant permission for the applicant to submit applications for finance with using our Broker codes in eMotor with the below access.

Team View

Own View

Name of Director/Business Owner

Signature

Company/Business Name