



Home / Investment Loan Evaluation

From (referring Accountant / Financial Planner)

Dear client,

I assist my clients with their finance needs by referring them to Lifespan’s in-house finance specialist company Quay Finance. They pay me a referral commission (detailed below) out of the commission they receive from lenders, at no extra cost to you.

These few simple questions will allow Quay Finance to compare you current home or investment loan to other products through the many lenders available.

Date Completed: / /

1. Borrower Details

Borrower Name	
Email Address	
Preferred Contact Phone Number	

2. Property and Loan Details

	Property 1 (home)	Property 2 (Inv)	Property 3 (Inv)
Current lender			
Estimated value of your home			
Estimated balance of your mortgage			
Current monthly repayment, or interest rate			
Estimated Date of establishment of this loan			

3. Insurance Information

-----	Life Insurance	Trauma	Income Protection
Amount			
Provider			
Premium paid			
Waiting period	n/a	n/a	
Benefit period	n/a	n/a	

Referral Commission Disclosure:

30% of the upfront commission received by Quay Finance is paid to the referrer
 40% of the trailing commission received by Quay Finance is paid to the referrer

Consent to provide contact details to Quay Finance

I / we agree to have our contact details provided to Quay Finance for a mortgage consultant to contact me / us and discuss the possible restructure of our current loans, or arrange a new loan facility.

Signature: Borrower 1

Signature: Borrower 2