

How we will work together.

1

Discovery

You'll complete a set of questions online about what you're trying to do, your income, assets and other financial information.

2

The meeting

We'll talk about your goals and present some initial options that might be suited to you.

3

In-depth research

We'll compare the market and ensure our recommendation is best suited for your needs and most competitive solution.

4

Loan recommendation

We'll present to you a personalised Game Plan with tailored solutions and recommendations to meet your goals and objectives.

5

Lodge your application and prepare for signing

We'll work with the lender you choose to package, sign and lodge your documents - and do the legwork to get you approved.

6

Approval moment

Time to celebrate! We'll let you know that everything has gone smoothly with your loan application.

7

Settlement Day

This is the moment when the lender releases the money to you. We'll be on hand during the settlement process to let you know everything has gone through.

8

Together for the long haul

We're in this together and this is just the beginning. I'll be in regular contact with you to check in on your situation and make sure your loan continues to work hard for you.