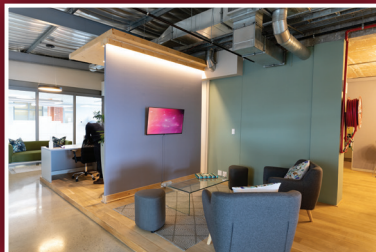


First Point Group

YOUR PARTNER FOR FINANCE



WELCOME



First Point Group
YOUR PARTNER FOR FINANCE

Phone: (03) 9882 2500

www.firstpointgroup.com.au

Suite 11, Level 1, 255 Whitehorse Road

Balwyn VIC 3103

How Can We Help?



YOUR TRUSTED ADVISERS

- Personalised and friendly approach
- We get to know you, and we are here for the long term
- We'll always put your best interests first!
- Detailed research, comparisons, and recommendations
- We do not charge a fee; we get paid by the Lender you choose*



FIND THE RIGHT SOLUTION

- We'll compare a wide range of lenders
- We'll negotiate interest rates and fees for you
- Professionally match your needs to the most suitable lender that is in your best interests



SAVE TIME

- We'll navigate the market for you
- Fast approvals
- We handle all communication with the Lender for you
- Market leading technology = less paperwork!
- Online secure Client Portal
- Easy communication and regular status updates



CONNECT WITH OTHER TRUSTED SERVICES

- Accounting
- Conveyancing/Legal
- Property Advice
- Financial Planning
- Insurance Services
- Utility Connections

*There may be times when we charge a fee for our service, this will be disclosed to you in a Quote before we proceed.

We Provide Choice...



This is not a complete list of all Lenders that we have access to

How We Will Work Together

01

FIRST MEETING

We initiate the first meeting / telephone / email contact, and discuss your requirements and objectives

02

DATA GATHERING

We gather initial data from you to shape and structure the loan proposal using our online secure Client Portal

03

IN-DEPTH RESEARCH

We search the market for the most suitable loan to match your needs using leading edge technology and the significant experience of the First Point Group team

04

RECOMMENDATIONS

Our Loan recommendation is presented to you professionally and outlines all the relevant details

05

TIDY APPLICATION / STATEMENT OF CREDIT ASSISTANCE

We agree to proceed, and gather any remaining data required for your loan application

06

LODGE APPLICATION

We prepare your loan submission and lodge the application on your behalf

07

APPROVAL

We liaise with the Lender on your behalf until your Loan is approved

08

LOAN DOCUMENTATION

We manage the entire process including property valuation, liaising with your solicitor/conveyancer, preparation of Loan Documents, document return and settlement process – keeping you informed the whole time

09

SETTLEMENT DAY

Settlement day! We assist your Conveyancer to ensure settlement is successful

10

STAY IN TOUCH

We check in with you after settlement, and ongoing, to ensure you have everything that you need. We will also ensure your loan remains competitive and continues to meet your needs

Connecting and Protecting You



LENDING SERVICES

- Home Loans
- Investment Loans
- Refinance
- Commercial Loans
- Car Loans
- Business Loans
- Equipment Loans
- Cash Flow / Working Capital
- SMSF Lending
- Construction Loans



ACCOUNTING, LEGAL, PROPERTY ADVICE, FINANCIAL PLANNING

Our network of trusted Alliance Partners can assist with:

- Conveyancing
- Taxation Advice / Tax Returns
- Business Structuring and Planning
- Real Estate Buyer & Seller Advocacy
- Legal Advice
- Superannuation Consulting
- Wealth Creation



INSURANCE SERVICES

Our network of trusted Alliance Partners can assist with:

- Income Protection
- Life Insurance
- Trauma Cover
- Total & Permanent Disability Insurance
- Car and Asset Insurance
- Home and Contents
- Landlord Insurance



UTILITY CONNECTIONS

We partner with a high quality utility connection broker who can easily arrange connections from your choice of Providers:

- Electricity
- Gas
- Water
- Internet