



Reset

# Commercial Connect Referral Advice



Please email your completed form to your CommBank Business Development Executive.  
To find a CommBank Business Development Executive visit [commbankbrokers.com.au](http://commbankbrokers.com.au)

## Section 1 – Referrer details

Intermediary, Head Group name		Referrer's business name	
<input type="text"/>		<input type="text"/>	
Referrer's name	Telephone number	Contact email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Do you hold 3rd Party CommBank Home Loan accreditation		3rd Party Relationship Manager's name	CF number
<input type="checkbox"/> No (proceed to Section 2) <input type="checkbox"/> Yes (please complete)		<input type="text"/>	<input type="text"/>

## Section 2 – Client details

Business name		Contact person name	
<input type="text"/>		<input type="text"/>	
Contact person position			CBA client
<input type="text"/>			<input type="checkbox"/> Yes <input type="checkbox"/> No
Employment situation		Telephone number	
<input type="text"/>		<input type="text"/>	
Email address		Mobile number	
<input type="text"/>		<input type="text"/>	
Postal address (PO Box is not acceptable)			
<input type="text"/>			
		State	Postcode
		<input type="text"/>	<input type="text"/>
Preferred time		Preferred day (Monday to Friday)	
<input type="checkbox"/> Morning <input type="checkbox"/> Afternoon <input type="checkbox"/> Any <input type="checkbox"/> Other		<input type="text"/>	

## Section 3 – Products

Commercial Lending    Vehicle and Equipment Finance

## Section 4 – Finance required

Loan purpose

## Section 5 – Referrer declaration

I DECLARE & CERTIFY to the Bank that on I informed the Customer about the Bank's credit activities and:

- (a) obtained the Customer's consent to be contacted by a Bank Representative within 15 business days;
- (b) disclosed to the Customer the benefits, including commission, which I or an associate of mine may receive from this referral;
- (c) informed the Customer that their personal information may be collected by the Bank to administer its customer relationships and to provide the Customer with any product or service requested, and that information concerning the Bank's privacy policies is available on the Bank's website [www.commbank.com.au](http://www.commbank.com.au) or by phoning **1800 805 605**;
- (d) I have not requested the Customer to pay any fee for this referral;
- (e) I have not engaged in activity for which a credit licence is required under the National Consumer Credit Protection Act 2009; and
- (f) in making this referral, I have not provided advice, a recommendation, opinion or other statement that would influence the Customer in making a decision about a product or service regulated by Ch. 7 of the Corporations Act 2001.

Referrer signature	Date
<input type="text"/>	<input type="text"/>

