OXBRIDGE
ACHIEVING EXCELLENCE

Email: **admin@oxbridge.finance**
Mail: Level 13 Citigroup Building, 2 Park Street 2000
Call on **1300 680 690** or visit **oxbridge.finance**

Oxbridge Finance Referral Form

P | 1300 680 690 W | www.oxbridge.finance E | admin@oxbridge.finance
W | www.oxbridgehomeloans.com.au E | admin@oxbridgehomeloans.com.au

1. CLIENT DETAILS

Full Name(s): A _____ Phone Number _____

B _____ Phone Number _____

Preferred Contact Time: _____

Residential Address: _____

Email Address: _____

2. CLIENT FINANCE NEEDS

The Client(s) have given their consent to the Referrer to disclose their personal information to Oxbridge for the purpose of arranging an obligation free consultation regarding their finance needs as outlined below:

Loan Needs:			
	Puchase	☐ Owner Occupied Home	$
		☐ Investment Property	$
		☐ Off The Plan	$
	Refinance	☐ Owner Occupied Home	$
		☐ Investment Property	$
		☐ Business Loans / Repay Taxation Debt	$
		☐ Debt Consolidation	$
	Other	☐ Equity Release / Personal / Car	$
	Total Loan Amount		**$** 0.00

Employment: Client A ☐ PAYG ☐ Self-Employed

Client B ☐ PAYG ☐ Self-Employed

Commision Splits _____

3. REFERRER DETAILS

Full Name(s):

Oxbridge ID:

Phone Number: Email:

Address:

4. REFERRER ACKNOWLEDGEMENT

I, the Referrer declare that:

1. I am not banned from engaging in credit or finance related activities.
2. I have disclosed to the Client/s any commissions or associated benefits applicable to this referral.
3. I have received the Clients consent to pass on their personal information to Oxbridge Homeloans and Oxbridge Finance.
4. I have not received a payment from the Client/s in relation to this referral.
5. (Please specify which applies to you)

   ☐ I have a current Referral Agreement or an active accreditation with Oxbridge

   OR

   ☐ I do not have a current Referral Agreement or an active accreditation with Oxbridge Finance and Oxbridge Homeloans.
6. I do not conduct a business that is not principally making contact with persons to give their names or other details to another person.
7. I have only informed the Client/s that I am able to arrange for loans but not specifiy or recommend a particular product or lender.
8. I have submitted this referral to Oxbridge within 2 business days, after informing the client that a Oxbridge representative will be in contact with them to discuss their finance needs and relevant credit service.
9. (Please specify which applies to you)

   ☐ I hold a current Australian Credit Licence Number : (ACL) #

   AND I have enclosed a copy of my current professional indemnity insurance cover with this Home Loan Referral Form.

   OR

   ☐ I am an Authorised Credit Representative: (ACR) # of

   Australian Credit Licence holder (ACL) #

   AND I have enclosed a copy of my Australian Credit Representative appointment/authorisation with this Loan Referral Form.

   OR

   ☐ My current profession does not require me to hold a current Australian Credit Licence

   AND I confirm that I have not engaged in credit activities or provided any advice to the clients as defined by ASIC and the National Consumer Credit Protection Act (NCCP).

Referrer Name:

Signature Date