



REFERRER NOTIFICATION FORM

- Multiple split arrangements may be set up with the same Referrer. In this instance, please complete the Referrer Notification Form only once per Referrer, and the Commission Structure details for each required commission split.
- Please return completed form/s directly to PLAN Australia for review at plan.support@planaustralia.com.au. Should you have any queries in completing the form, please contact PLAN Support on the above email address.
- Upon completion of processing, a Split ID Code will be emailed to the PLAN Australia Agreement Holder or Loan Consultant for use on all Loan Lodgements where the commission split with the Referrer is to be applied.
- A separate Split ID Code will be allocated and advised for each arrangement you have with your Referrer(s).
- All supplementary PLAN Australia forms can be downloaded from Podium under *More/Library/PLAN Communications & Documents/Membership/Consultant Admin Documents*.

PLAN AGREEMENT HOLDER:

Full name:

PLAN ID number:

REFERRER TO BE SET UP UNDER:

Agreement Holder/Loan Consultant's name:

Agreement Holder/Loan Consultant's PLAN ID no.:

REFERRER'S DETAILS:

Entity name:

Director name(s):

Referrer contact name *(For setup in system and Primary Contact)*:

Date of Birth:

ABN *(must be active)*:

ACN:

Professional Lenders Association Network of Australia Pty Ltd ACN: 086 490 833 as trustee for the PLAN Australia Unit Trust
Level 10, 700 Bourke Street, Docklands VIC 3008 **Phone:** 1800 763 486 **Web:** www.planaustralia.com.au

REFERRER:

REFERRER'S GST INFORMATION:

Is your Company/Business registered for GST?

Yes No

PLAN Australia requires your Company/Business to be registered with the Australian Tax Office for the purposes of claiming input tax credits and maintain such registration, regardless of whether your Company/Business would otherwise be exempt from the requirement to register under the A New Tax System (Goods and Services Tax) Act 1999 (Cth), or any law that replaces that Act, and any regulations and rulings made under that Act.

REFERRER'S CONTACT DETAILS:

Postal address:

Registered business address (if different to above):

Telephone no. (Require at least one):

Primary email address:

REFERRER'S BANK ACCOUNT DETAILS:

Upfront and Trail Commissions are paid directly to the Referrer's bank account via direct bank transfer from the PLAN Commission Trust Trustee. Please advise the details for the account to which your Referrer would like commissions paid. Please note that upfront & trail commissions **must be paid to the same account**.

Bank:

Account name:

BSB:

Account number:

POSSIBLE EXISTING RELATIONSHIP BETWEEN REFERRER & PLAN AUSTRALIA:

Is the Referrer currently a PLAN Australia Agreement Holder?

Yes No

Is the Referrer currently a Loan Consultant under a PLAN Australia Agreement Holder?

Yes No

If yes, the Referrer's existing Agreement Holder that they are a current Loan Consultant under is to provide acknowledgment of this new referral arrangement via email to PLAN Support, to confirm they are aware their Loan Consultant is entering into a referral arrangement with another Agreement Holder (acknowledgment email must be submitted with referrer request).

Reason for seeking a referral arrangement when the Referrer is an active PLAN Australia broker in their own right:

The above is required to provide clear responsibilities to ensure that both Agreement Holders are aware of existing/new arrangements. It also ensures clarity regarding any conflicts of interest for rights to commissions where deals or referrals are placed under one Agreement Holder and not the other.

COMMISSION STRUCTURES:

Commissions due for all approved and drawn loan applications introduced by the Referrer to the PLAN Australia Agreement Holder and submitted to a PLAN Australia Panel Lender will earn a Commission split as follows:

COMMISSION STRUCTURE 1:

SPLIT CODE NAME: <i>Maximum of 30 spaces</i>				
ROLE:	NAME:	PLAN ID:	UPFRONT COMMISSION:	TRAIL COMMISSION:
Agreement Holder			%	%
			%	%
			%	%
			%	%
			%	%
TOTAL:			100%	100%

COMMISSION STRUCTURE 2:

SPLIT CODE NAME: <i>Maximum of 30 spaces</i>				
ROLE:	NAME:	PLAN ID:	UPFRONT COMMISSION:	TRAIL COMMISSION:
Agreement Holder			%	%
			%	%
			%	%
			%	%
			%	%
TOTAL:			100%	100%

Please note: These splits are applied to the net commission available after deduction of Professional Lenders Association Network of Australia Pty Ltd ACN 086 490 833 ("PLAN Australia") entitlements. For any loans affected by claw-backs, which may occur during the life of any introduced loan(s), all commissions will be repaid as per the most recent split arrangement.

All Loan Consultants require access to this split code
OR

Only selected Loan Consultants require access to this split code (Provide loan consultants details below)

Name:		PLAN ID no.:	
Name:		PLAN ID no.:	
Name:		PLAN ID no.:	
Name:		PLAN ID no.:	
Name:		PLAN ID no.:	
Name:		PLAN ID no.:	

DECLARATIONS:

PLAN AUSTRALIA AGREEMENT HOLDER:

I, (PLAN Australia Agreement Holder) confirm that I have/my Loan Consultant has a referral relationship with (Referrer) as a referrer of business.

I further confirm and acknowledge that:

- I have fully explained and disclosed to the Referrer that agreed commission will be paid at my discretion and direction to PLAN Australia and its Trustee.
- I am registered with the Australian Tax Office ("ATO") for the purposes of claiming input tax credits and will maintain my registration, regardless of whether I would otherwise be exempt from the requirement to register under the *A New Tax System (Goods and Services Tax) Act 1999 (Cth)*, or any law that replaces that Act, and any regulations and rulings made under that Act. I acknowledge that PLAN Australia may withhold my commission payments for such time as I am not registered with the ATO.
- I will notify PLAN Australia and the Referrer upon any change in my GST circumstances.
- I will notify PLAN Australia should I become aware of any change in the Referrer's GST circumstances.
- I will issue Recipient Created Tax Invoices to the Referrer in respect of any taxable supply provided by the Referrer who is not required to issue tax invoices in respect of those taxable supplies.
- I indemnify the Referrer for any liability for GST and penalty that may arise from an understatement of the GST payable on a taxable supply on a tax invoice issued by me.
- To the best of my knowledge and belief, all information provided in this form is true and correct.

Signature:

Date signed:

Print name:

PLAN ID number:

REFERRER:

I, (Referrer) confirm that I have a referral relationship with (PLAN Australia Agreement Holder/ PLAN Australia Loan Consultant).

I further confirm and acknowledge that:

- I have read PLAN Australia's Privacy Notice below;
- I understand and agree that payment of agreed commissions are at the sole discretion and direction of the PLAN Australia Agreement Holder.
- For the purpose of this arrangement, I am not a member with PLAN Australia.
- I am registered with the Australian Tax Office ("ATO") for the purposes of claiming input tax credits and will maintain my registration, regardless of whether I would otherwise be exempt from the requirement to register under the *A New Tax System (Goods and Services Tax) Act 1999 (Cth)*, or any law that replaces that Act, and any regulations and rulings made under that Act. I acknowledge that PLAN Australia may withhold my commission payments for such time as I am not registered with the ATO.
- I will notify the PLAN Australia Agreement Holder and PLAN Australia upon any change in my GST circumstances.
- I understand that the PLAN Australia Agreement Holder will issue Recipient Created Tax Invoices to me in respect of any taxable supply provided by me and I will not issue tax invoices in respect of those taxable supplies.
- I understand that the PLAN Australia Agreement Holder indemnifies me for any liability for GST and penalty that may arise from an understatement of the GST payable on a taxable supply on a tax invoice issued by them.
- To the best of my knowledge and belief, all information provided in this form is true and correct.

Signature:

Date signed:

Print name:

PLAN Australia may collect personal information about you from this form. You can find details about how PLAN Australia manages your personal information by reading the PLAN Australia privacy notice and the PLAN Australia privacy policy which you can access at www.planaustralia.com.au/privacy-policy.