



Elevate Accreditation Commissions and Requirements

We now offer 2 types of commercial accreditation,

1. Foundation Broker Partner
2. Foundation Referrer Partner.

Please see below the qualifying criteria and requirements for each accreditation:

Broker Partner

1. Commissions:
 - a. Upfront Commission, varies between products:
 - Invoice finance
 - Auto finance and business loan
 - b. Trail Commission for Invoice finance facility.
 - Invoice finance:
 - c. Additional commission
 - All products that are taken up by an introduced customer during the lifetime of its dealings with Elevate will accrue Lifetime Introducer Payments irrespective of if the customer is dealing directly with Elevate. These payments are set at 25% of the Upfront Commission allocated for that product.
2. Information you need to collect from your customers:
 - a. Requested Invoice Finance Amount
Please specify the amount of invoice finance being requested.
 - b. Applicant company information
Include the following details:
 - Company Name
 - ABN
 - Trust & Trustee Names (if applicable)
 - Contact name and details for the applicant
 - c. Annual turnover - Provide evidence of the company's annual turnover (e.g. most recent tax return).
 - d. Projected Business Growth (Next 12 Months)
Is the business expecting growth within the next 12 months? If yes, please indicate:
 - Expected Turnover Growth (%)
 - Expected Profit Growth (%)
 - e. Existing Finance Facilities
List details of any existing finance the applicant currently holds with lenders, banks, the ATO, or leasing companies:
 - Financier name
 - Type of loan
 - Monthly Repayments
 - Terms Retaining
 - Amount Outstanding



f. Business Security Details

If there is any existing security held over the business, please provide details

- Description of security
- Can this security be released/removed?

g. Accounting Software

Specify the accounting software used by the applicant company (e.g. Xero, MYOB, etc.).

h. Financial Statements

Are the company's financial statements up to date?

i. Trade Debtors

State the total amount currently owed to the applicant company by trade debtor.

j. Submission of a loan application should include commentary and analysis of the customers' business including History, Capacity to Service, Security Structure and purpose and structure of transaction.



Referral Partner

1. Commission
 - a. Commercial Product Commission Structure
 - Upfront Commission only.
2. What do they need to prepare for use as part of application:
 - a. Customer contact details:
 - Full name
 - Phone number
 - Email address
 - A brief outline of the customer's request. (This is to enable us to arrange for the most appropriate banker to make contact).
 - b. Requested Invoice Finance Amount
Please specify the amount of invoice finance being requested.
 - c. Applicant company information
Include the following details:
 - Company Name
 - ABN
 - Contact name and details for the applicant
 - d. Annual turnover
3. Their professional requirements:
 - a. Consideration will be given on a case-by-case basis for brokers with less than 2 years of commercial lending experience and/or those not currently active in the commercial lending space.
 - b. The Referral Partner must have a live transaction that fits Judo's target market that they would like to refer to Judo.
 - c. The referral partner can choose to be involved in the transaction, and the level of involvement will be up to the broker. Our bankers are willing to help educate the referrer about commercial banking.



Join us

1. Please fill in the Introducer Accreditation Application form (the 'Application Form').
2. Please sign the Elevate Funding Distribution Agreement (the 'Agreement').
3. Please email the information required in the Application Form and the Agreement to info@elevatefunding.com.au