



Customer Introduction

| Customer Details | |
|----------------------|--|
| Name | |
| Application Number | |
| Home Phone | |
| Work Phone | |
| Mobile | |
| Type of Loan | |
| Nominated ANZ Branch | |

ANZ Breakfree Package
 ANZ Professional Package
 No Package

| Customer Requirements | | |
|--|--------------------------|--------------------------|
| | Yes | No |
| Complete Customer Identification Process | <input type="checkbox"/> | <input type="checkbox"/> |
| Open an ANZ Transaction/Offset Account | <input type="checkbox"/> | <input type="checkbox"/> |
| Choose from ANZ's Credit Card range | <input type="checkbox"/> | <input type="checkbox"/> |
| Sign a Signature Card for an Equity Manager Account | <input type="checkbox"/> | <input type="checkbox"/> |
| Apply for an ANZ Assured (overdraft) Facility \$500/\$1000 limit | <input type="checkbox"/> | <input type="checkbox"/> |
| Register for Phone/Internet Banking | <input type="checkbox"/> | <input type="checkbox"/> |
| Referral to Financial Planner for Income Protection | <input type="checkbox"/> | <input type="checkbox"/> |
| Mortgage Protection Insurance | <input type="checkbox"/> | <input type="checkbox"/> |
| Building Insurance | <input type="checkbox"/> | <input type="checkbox"/> |
| Contents Insurance/ Residential Investment Property Insurance | <input type="checkbox"/> | <input type="checkbox"/> |

| Appointment Details | |
|--|-------|
| The customer would like an appointment to see an ANZ personal banking consultant on: | |
| Date: | Time: |
| Comments: | |
| Broker Details | |
| Name | |
| Company | |
| AO/SAO | |
| Phone Number | |
| Fax Number | |
| Email Address | |

Branch Use Only. Please load the RDM code on the Salesforce screen for all CAP products sold.

Disclaimer: The customer acknowledges the above appointment details as an indication of their preferred appointment time only, and not as a confirmed booking. ANZ also takes no responsibility for the loss of this fax/email when making the appointment. The above products have not been sold by the mortgage broker.