Customer on-boarding journey





Here are the steps you and your customers will experience as we welcome them as MyState Bank customers.



Once the loan is formally approved, loan documents will be issued within **2 business days**.

- Our 'Banking with us' form is issued with loan documents, where customers can instruct us how they would like to bank with us.
- Once documents have been returned and certified, any requested accounts/ facilities will be established and details will be shared directly with customers.

Example Customer Correspondence

Congratulations on the approval of your new Home Loan. As requested, we have opened your Glide Account and emailed you your account details.

If you have requested a Visa Debit Card this should arrive in the post within the next 7 - 10 business days.

You can review your accounts 24/7 through Internet Banking. If you haven't already, please contact us to provide your Tax File Number or exemption.

If there is anything else we can do for you, let us know.





Should the applicant wish to set up these services prior to signing the loan documents, they can complete our 'Banking with us' form and email to: brokersupport@mystate.com.au

The form can be accessed at <u>brokers.mystate.com.au/</u> resources/



Once your customer's loan has settled any offset accounts will now be linked to the loan, direct debits established and confirmation of the new account details shared directly with customers.

Example Customer Correspondence

We are pleased to advise that your loan funding has been completed. Your monthly repayments of \$1,000.00 will be due on the 7th of each month.

Should you require anything further, please contact us on 138 001.



Any questions?

We're here and ready to help you.



For Brokers

Call Broker Support on 1300 888 306 Monday — Friday: 8.30am — 5.00pm (AEST/AEDT)



For Customers

Call Lending Solutions 1300 322 196



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