



Broker Tasks Post Settlement

- **Ask the Lender for a Settlement & Repayment Details Letter**
- **Loan Settled Client Call, Settled Letter Posted & Reviews Link emailed**
- **20 Day Phone Call (Lender Welcome Letter & ATM Cards received (If req), Internet Banking & Redraw set up?)**
- **Letter Post Settlement 3 months Complementary Catch Up Session**
- **90 Day Client Phone Call**
- **Letter Post Settlement 6 months & Phone Call**
- **Letter Post Settlement 12 months SCRATCHIE and Prop Report**
- **Letter Post Settlement 18 months**
- **Letter Post Settlement 24 months**
- **Fixed Loan EXPIRY due in 1 month**
- **Interest Only EXPIRY due in 1 month**
- **Loan Review to GO PRIME? (if a specialist loan was written)**
- **Client Birthday Dates set up in your CRM**