

— PARTNER WITH PROBIZ

A Referral Partnership for *Solicitors & Conveyancers*

Keeping settlements on track, so a finance date never becomes your problem.



Finance-ready

Stage 4 of 6



You're updated

Few things create more last-minute pressure than a purchaser whose finance isn't sorted as the finance or settlement date approaches. Probiz Finance gets clients finance-ready early, keeps you informed as key dates approach, and reduces the extension requests landing on your desk.

— AT A GLANCE

The partnership in 30 seconds



Fast, focused

We move at your client's pace



You keep the client

We handle finance only



You're kept informed

Updates at key stages



No cost, no obligation

Nothing owed if they don't proceed

1

You flag the client



2

We reach out within a business day



3

We keep you updated



4

Your client gets finance-ready

01 — WHY PARTNER WITH US

Why Partner With Probiz Finance

A finance partner who understands why your dates matter.



We work to your critical dates

Finance date and settlement date drive how we prioritise a file — we know what a slip means for your matter.



Fewer extension requests

Starting finance early — ideally as soon as contracts are signed — means fewer requests to the other side for more time.



Structure-sensitive purchases

Trusts, companies, SMSFs and business acquisitions — we coordinate with you where structure affects the finance.



We keep you in the loop

You'll hear from us proactively as key dates approach — no chasing a purchaser (or us).



No cost, no obligation

No cost to you for referring, and no pressure on the client if it's not the right fit.



"Our job is the finance, full stop. You keep the relationship — we keep you in the loop."

Pooja Choudhary · Business Finance Specialist, Probiz Finance

You keep

The client relationship

We handle

The finance conversation

You hear

Updates at key stages

Nobody pays

If it doesn't proceed

02 — WHERE WE FIT

Signs a client needs us

Moments in a file that are really a finance question sitting inside a legal one.

WHAT YOU'RE HEARING



"A finance clause date approaching, unconfirmed"



"Client asking to extend settlement — finance not ready"



"Purchase through a trust, company or SMSF"



"Client hasn't spoken to a broker yet"



"The matter is a business acquisition"



"Tight settlement date, finance still uncertain"

THE LIKELY FINANCE NEED



Fast-tracked finance before the clause lapses



Often avoidable — refer early on the next matter too



Structure-aware finance, coordinated with you



An early referral, before pressure builds



Acquisition finance alongside lease assignment



Urgent processing and direct coordination



Timing matters

Start the finance conversation right after contracts are signed, not as the finance date approaches — fewer date conversations with the other side.

03 — THE PROCESS How referring works

- 1 **You flag the client**
A name, contact details, and the key dates — finance date and settlement date.
- 2 **We reach out directly**
Usually within one business day — focused on moving finance against your timeline.
- 3 **We update you as dates approach**
So you're never caught out and can manage the other side's expectations.
- 4 **You keep the matter**
We don't give legal advice or step into the conveyancing — our job is the finance.
- 5 **No cost, no obligation**
If it's not the right fit, we'll say so.

04 — YOUR PART What we need from you

- ✓ **A warm introduction**
The client's name, contact details and type of matter.
- ✓ **The key dates on the file**
Finance and settlement dates let us prioritise from day one.
- ✓ **That's it**
We come back to you with updates — no chasing.

On referral rewards: Under our Referral Partner Agreement, you receive a \$250 gift card for each referred client whose loan settles. It's disclosed to your client upfront, so it's always transparent and consistent with your professional obligations.

Let's set up a proper introduction

A short, no-obligation call with Pooja about how a referral partnership could work alongside your conveyancing and business matters.

☎ 0415 929 728 ✉ pooja@probizfinance.com.au

📅 **Book a 20-min chat**