

### PERSONAL LENDING

#### Quick tips

1. Once your application is 'Approved - Contracts Ready', you can complete the Required Actions to send contracts.
2. Introducers complete the 'Direct debit information' and 'Disbursement' confirmation.
3. Signing is completed via DocuSign, with wet signature as an option for customers.

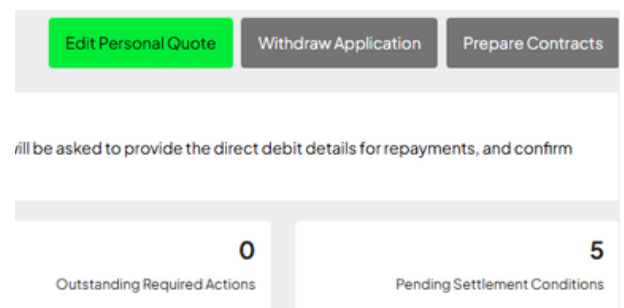
### Direct debit information

- > Before you can issue the contracts, confirm the direct debit information. To do this, click on 'Prepare Contracts' at the top right-hand side of the portal.

Enter the name of the bank, the name of the account holder and the bank account number.

Check that these details are accurate, along with the settlement date and first repayment date and click 'Submit'.

That completes this action, and you can then move on to the 'Disbursement table'.



Buttons: [Edit Personal Quote](#) [Withdraw Application](#) [Prepare Contracts](#)

will be asked to provide the direct debit details for repayments, and confirm

0	5
Outstanding Required Actions	Pending Settlement Conditions

#### Name of bank \*

#### Name of Account Holder \*

#### Bank Account Number \*

#### Settlement date \*

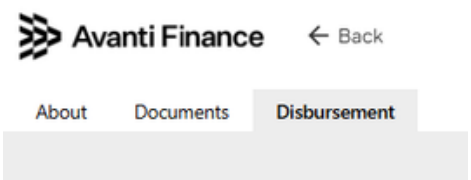
#### First repayment date \*

### Disbursement table

- > To access the disbursement table, click on the 'Disbursement' tab.

The total disbursement amount will be displayed under 'Total to pay'. As each disbursement line is verified, the 'Allocated' amount will increase, while 'Remaining' decreases to \$0 once completed.



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Application status	Total to pay	Allocated	Remaining
<b>Preparing contracts</b>	<b>\$25,717.00</b>	<b>\$0.00</b>	<b>\$25,717.00</b>

[Make changes](#)

To make any changes to the deal, click 'Make changes' which will allow you to edit the auto quote and re-complete the process.

## Disbursement table cont.

Disbursement								1 - 2 of 2	1	10 per page
Disbursement Type	Payee	Amount	Bank Account No	Particulars	Code	Reference	Confirm Details			
Broker Fee	Test Dealer	\$260.00	12 3030 0041069 00	00002122	[AccName]	[AccId]	✗	View		
Commission	Test Dealer	\$671.00	12 3030 0041069 00	00002122	[AccName]	[AccId]	✗	View		

Disbursement								1 - 1 of 1	1	5 per page
Disbursement Type	Payee Name	Amount	Bank Account No	Particulars	Code	Reference	Confirm Details			
Payout Disbursement	Test Dealer	\$29,595.00	12 3030 0041069 00	00002122	[AccName]	[AccId]	✗	View		

- > Click 'View' to review each disbursement line.

The disbursement section is broken into three sections:

### Fees and commission

Fees and commission disbursement records are system-generated. Please review and confirm each line item.

### Payout remittance records

Payout and remittance disbursement records are system-generated. Please review and confirm each line item. If the payout needs to go to another party, please clear the relevant amounts and create manual disbursements.

### Third party and manual records

If you have any additional third-party or manual disbursement records for this application, you can create them in this section.

- > Once all disbursement lines are complete, you can edit the quote or dates at any stage before selecting 'Send contracts for signing'.

## Generate contracts

- > Once you select 'Send contracts for signing', the application status will enter the 'Contract signing in process' stage.

The contracts will first be sent to you for completion via DocuSign, before they are sent to the customer.

If the customer prefers to sign their contract using a wet signature, they can select 'Download' to print, sign and upload the contract directly to DocuSign. This ensures the contract and automated process will continue seamlessly.

- > Need to make changes? Click on 'Void contract' to return to 'Contract ready' stage. You can then make any updates required.

## Need further support?

Contact our dedicated support team on **0800 003 111** or [personal@avantifinance.co.nz](mailto:personal@avantifinance.co.nz). Alternatively, your local Relationship Manager can assist you.