

Fact sheet

Using FileInvite: our information-sharing platform

When you apply for a loan, lenders require certain documents as proof of your financial situation and your identity.

How do we get your information?

In the past, submitting documents to your Adviser has been a complex and time-consuming process for borrowers, requiring them to print, scan and email page after page of documentation. More importantly, email is now the number one method used by scammers to access your information, which means it's no longer safe to send personal or financial information via email. Fortunately, there is a better way!

Smartline now uses **FileInvite**, a highly regarded, globally recognised software platform, to gather the information our Advisers need to put together your loan application.

How does it work?

1. Your Smartline Adviser will email you an invite to access the platform. You should click on the red button: 'Click to Get Started'.
2. Under each section in the numbered list, you should click 'Upload Files' and then attach the requested documents from your computer. There is space to write a note to your adviser if necessary. Then press 'Save'.
3. The Income Statement/PAYG summary section: to access this information go to the ATO portal on the MyGov website. Download your documents in PDF format from MyGov and save it to your computer, then upload them to FileInvite.
4. The Bank Statements section: When you click 'Upload Files', you will be taken to our bank statement portal. Make sure you upload statements of all your accounts, including credit cards and existing loans.

What are the benefits of using the platform?

- The biggest benefit is the vastly increased security the platform provides. By using this software, we can ensure your personal data is fully protected.
- When you use the platform, it speeds up the entire loan application process. Not only does it provide you with a clear list of all documents required and step you through the uploading process, but it also ensures your Smartline Adviser receives all the required documents in the correct format in one place.
- The platform can also link through to our fully encrypted bank statement portal using [Illion's BankStatements](#) technology. Providing us with your bank statements this way is also much faster and more secure than making screenshots or scanning and emailing your statements.

Why we use FileInvite

Sharing your documents via FileInvite is a much quicker, easier and more secure way of providing personal and financial information to your Adviser for your loan application. If you have any questions or concerns, your Adviser will be happy to talk you through them.

Get personalised advice

Everyone's circumstances are unique. Speak with your Smartline Adviser for more information and to get personalised advice that matches your requirements.



smartline
personal mortgage advisers