



PRO
Astra Globus

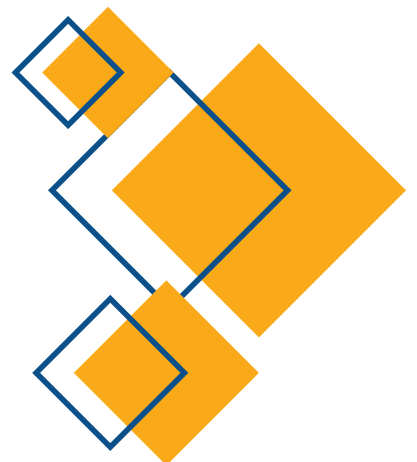


**YOUR VISION,
OUR EXPERTISE!**

**Pro Astra Globus;
Empowering
Business Growth.**

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ABOUT US

At Pro Astra Globus, we bring over 10+ years of expertise in empowering mortgage brokers, Insurance Brokers, small and mid-sized accounting & tax firms and CPA practices with Elite Virtual Industry Experts. Our journey has been defined by a commitment to providing tailored solutions that enhance efficiency and deliver exceptional value.

Under the banner of Pro Astra Globus, we are dedicated to supporting clients seeking reliable and experienced remote specialists to elevate their business operations. Whether it's accounting, tax preparation, mortgage processing, or backend support, our team is equipped to meet the unique needs of your organization.



We believe in building long-term partnerships, where client success is our ultimate goal. By combining industry knowledge with a personalized approach, we help you focus on what truly matters: growing your business.

OUR LOAN PROCESSING SERVICES

- Part Time Assistant
- Full Time Assistant



VISION

To be a trusted partner in delivering bespoke solutions, setting new benchmarks in client-centric agility, and fostering a culture of growth and collaboration for our clients and employees alike.

MISSION



Our mission is to empower businesses by providing highly skilled Virtual Industry Experts who deliver quality-driven and efficient solutions. We aim to:

- Continuously adapt to client needs with agility and innovation.
- Create a supportive and growth-oriented environment for our employees.
- Drive success for our clients through collaboration, expertise, and a shared commitment to excellence.

What is included?

Part Time Assistant Services

- Dedicated account manager assigned to the broker on a part time basis for 80 hours in a month.
- Communicating with the client to gather the required information and supporting documents as and when required by the broker
- Thorough review of documents and redacting TFN
- Aggregator CRM data entry
- Preparing funding position reports
- Preparing lender product comparison reports
- Calculating the borrowing capacity in the CRM.
- Lender servicing calculator preparation
- Preparing compliance documents.
- AOL data entry
- Preparing lender application documents.
- Uploading supporting documents in AOL.
- File lodgement to lender.
- Preparing the discharge authority forms (if applicable).
- Valuation orders & follow up (if applicable).
- Pricing requests (if applicable).
- Follow up with the solicitor for settlement (if applicable).
- Follow up with lender through to settlement.



What is included?

Full Time Assistant Services

- Dedicated account manager assigned to the broker on a full time basis.
- Communicating with the client to gather the required information and supporting documents as and when required by the broker.
- Thorough review of documents and redacting TFN.
- Aggregator CRM data entry.
- Preparing funding position reports.
- Preparing lender product comparison reports.
- Calculating the borrowing capacity in the CRM.
- Lender servicing calculator preparation.
- Preparing compliance documents.
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How does the loan processing service work?

To be a trusted partner in delivering bespoke solutions, setting new benchmarks in client-centric agility, and fostering a culture of growth and collaboration for our clients and employees alike.

Team 1 File Preparation & Data Entry

- Creating the client folder in the brokers nominated storage app. (Eg. Onedrive / Google Drive / Dropbox)
- Creating the subfolders.
- Verifying the supporting documents.
- Redacting the TFN.
- Making a list of outstanding documents.
- Completing the data entry in the aggregators CRM.

Team 2 Review & Assessment

- Reviewing the data entry.
- Creating the lender product comparisons.
- Calculating the borrowing capacity.
- Completing the serviceability calculations with the lenders calculators.
- Ordering the valuations.
- Ordering the pricing.
- Preparing the compliance documents for the loan application.
- Preparing the AOL application.



How does the loan processing service work?

To be a trusted partner in delivering bespoke solutions, setting new benchmarks in client-centric agility, and fostering a culture of growth and collaboration for our clients and employees alike.

Team 3 Account Manager

- Communicating with the broker and providing updates on applications daily.
- Managing the file preparation, data entry and review & assessment teams.
- The final review of the AOL application.
- Preparing the lender loan application forms from AOL and sending them to the broker together with a list of the updated supporting documents required with the loan application.
- Submitting the AOL application to the lender after receiving the signed application forms and additional documents (if applicable).
- Following up on the conditional approval.
- Following up on the unconditional approval of the application.
- Following up on the loan offer documents.
- Following up on settlement



What we need to get started?

Why Choose Us?

- Your list of accreditation codes and log-in details for each lender (or at least the lender you will be using).
- CRM Login Details (username / password / website link)



What information is required from you?



- Our goal at Pro Astra Globus is to ensure that your loan application is settled as quickly as possible and that you have the best customer service. To achieve this goal we have a structured process in place. This helps us in providing the best outcome in the shortest period of time as well as avoiding any mistakes and delays.

The following documents are required at the commencement of each loan application:

- **Loan cover sheet**
- Which contains all the relevant information and broker note relating to the loan. Pro Astra Globus can provide you a copy of the loan cover sheet or you can use your own version.
- **Fact find / Client questionnaire**
- Not required to be provided if the applicants details are in the CRM or the file is a rework of a previous loan application.
- Breakdown of living expenses.
- Supporting documents

Providing documents to Pro Astra Globus

- Share your documents to us via the following methods:
CRM Login Details (username / password / website link)



- Acceptable file formats:



How we communicate

- Email (Your account manager can use the company email address or the broker can set up an email address from their domain).
- WhatsApp group (Pro Astra Globus sets up a group for brokers to communicate with their Account Manager and the Head of Operations).
- Third Parties (Pro Astra Globus uses an Australian landline number to communicate with the third parties)

Please note: If the documents are password protected, please provide the password.



PRO

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CONTACT US



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