

# Collaboration Opportunity

## White Label Mortgage

**Date:** 18 April 2018

**Time:** 11:00am – 12:00pm

**CPD:** 1 hour



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# Webinar – Collaboration Opportunity, White Label Mortgage

## Topic Outline

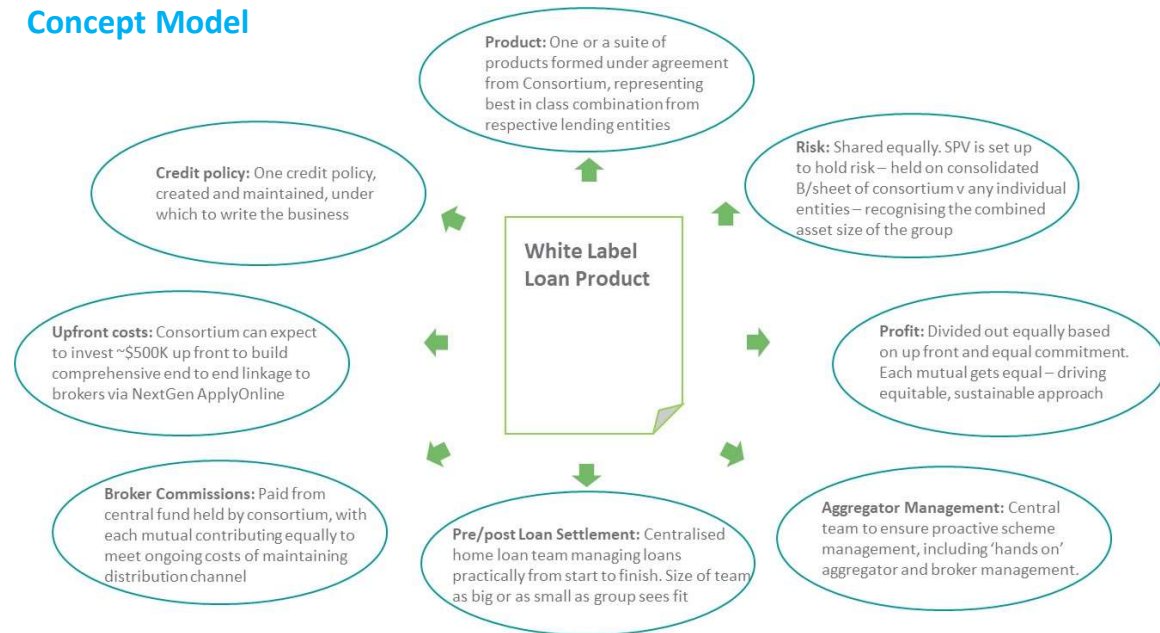
In late 2017 a collective of mutual ADIs began a conversation to consider the merit of pooling resources to create a generic ‘white label mortgage product’ – i.e. a shared cost and profit structure under a which a generic white label mortgage product could be developed to help smaller mutuals gain access to this growing and competitive market.

Initial meetings of a group of interested mutuals suggest a momentum to move this concept forward – specifically leveraging the quality of service and home lending products that mutuals as a sector bring to the market.

Central to the success of any such initiative is *aggregator management* – see schematic at right. In this context, the aggregated lending platform created by the mutual consortium Connxsyn will be the preferred aggregation platform should the WLM collaboration gain sufficient momentum to proceed to a proof of concept.

*This webinar presents the progress in the initiative to date, and next steps of the WLM initiative. Webinar participants will be invited to register an expression of interest in becoming involved in the project.*

## Concept Model





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### Who is this for?

Industry Senior and Lending Managers interested in investing in a collaborative effort to help small – medium sized mutuals break into the mortgage broker market.

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**Cost:** \$110.00 incl. of GST per person. Where there is more than one registrant for a particular webinar from the same organisation, a discount to the value of \$55.00 will accrue for each registrant beyond the first registrant, and will be refunded to the organisation in a single payment following the webinar.

### Cancellations and Transfers

A 50% refund is available for cancellations received with one weeks' notice of the webinar start date. Cancellations received within one week of the webinar will receive no refund. Registrations however can be transferred to an alternative participant at any time.

### Payment Options

Payment can be made via EFT or credit card via the Online Registration Process (note: 2% surcharge for card payments). The Online Registration Process will generate a tax invoice, which in the case of EFT payments must be forwarded to the registrants Accounts Payable area to ensure payment. All card transactions are processed immediately.

Where an authentication code is requested, please contact Kayley Segalla. Email: [kayleys@ism.nsw.edu.au](mailto:kayleys@ism.nsw.edu.au) Phone: 02 9744 5717.





## Webinar – Collaboration Opportunity, White Label Mortgage

### Our presenter – Tony Schesser

### Tony Schesser – CEO Instil, *Engaging bright minds*



Tony Schesser is the CEO of Instil – Engaging bright minds. Instil is a professional development organisation owned by the mutual sector and specifically for the mutual sector.

Tony has a comprehensive knowledge and understanding of mutuals (or customer owned banking institutions), having held senior roles in the industry over nearly 20 years including Cuscal, COBA, and Combined Financial Processing – an industry aggregator.

Prior to his time with the customer owned banking sector, Tony spent a number of years in the with mutual insurance providers – working for both AMP and NRMA prior to their demutualisation. Tony has an MBA from Charles Sturt University.



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