HOW TO TALK ABOUT CO-PILOT

A few rules, and the reasons behind them.

Most of this is common sense. It's written down so every broker, and every client, gets the same fair deal.

✓ Do

Log every client in the portal

Every quote saves against your account and its quote ID, so there's never a question about whose client it was.

Use the quote tool for the numbers

It shows what the lease costs each pay and everything it includes. Figures worked out elsewhere won't match what your client is offered.

Market with the co-branded kit

Every piece has been checked for compliance and carries your licence details. Use it freely across your own clients and partners.

Tell us when a client isn't a fit

Self-employed with no PAYG wage, carrying high-interest debt, or tight on a home loan. We'd rather hear it early than have the client find out later.

Forward client questions to us

If a referred client calls you about the lease, send it on. We answer the same business day and keep you in the loop.

Ask before you say something new

Want to claim something the kit doesn't? Send it to us through our enquiry form for confirmation, and we'll check it, usually within a day.

✕ Don't

Change the price after your client accepts

Use the sliding scale to sharpen a rate before they accept, down to the $500 minimum. Once they accept, that's the price our team works to.

Quote a dollar saving yourself

A saving only means something next to a named alternative over a stated term. A bare number sets an expectation the quote may not meet.

Run your own lease comms after submission

Once we submit the application, Positive owns communication about the lease. Two voices on one product confuses the client and muddies compliance.

Say it works for everyone

In some circumstances novated leasing isn't the right fit, and being upfront about that is what makes clients trust the rest. "It depends on your situation, and the quote will show you" is the honest line.

Edit the kit's compliance footer

Your licence number and disclaimers are your licensing protection as much as ours. If something's wrong, tell us and we'll reissue the set.

Describe it as a tax scheme or a loophole

It's an ATO-approved salary packaging arrangement. Calm, plain description does more for the client than clever framing.

Not sure? If a situation isn't covered here, send it to us through our enquiry form before acting. A quick check beats an awkward correction later.

These guidelines form part of your Co-pilot agreement, which prevails if anything differs. For Co-pilot partners only. Novated leasing is offered through Positive Salary Packaging.