

# Solution *Overview*

25 years helping business buyers  
succeed – by securing the right  
finance, reducing risk, & setting  
them up for strong performance  
from day one

**BUSINESS  
ACQUISITION  
FUNDING**



## *Decades of finance expertise helping you deliver faster, stronger client outcomes*

### About Winquote

Winquote is a privately run family business with over 25 years of experience helping clients secure tailored finance solutions for growth, acquisition, and business transitions. Built on decades of industry knowledge, we combine strong lender relationships with a personalised approach to deliver seamless outcomes for business brokers and their clients.

Our expertise is grounded in a solid foundation of financial services experience:

- 20 years in commercial banking at ANZ
- 12 years in financial planning through Winquote Wealth
- 25 years in finance broking for a wide range of industries as Winquote SME Finance

This depth of experience - gained from working with businesses in the same or similar industries - means we understand the pressures, timelines, and processes that matter most to brokers and their clients.

### Overcoming the Challenges of Buying a Business

- Finance approvals often take too long, causing buyers to miss out on opportunities.
- Many clients are unprepared or inexperienced in navigating the finance process.
- Poorly prepared applications presented to banks lead to delays and lost deals.

#### **Why Partner with Winquote as a Trusted Advocate.**

- We fully understand the deal, identify potential roadblocks, and address them early.
- We prepare clients thoroughly for their bank meetings, ensuring they present professionally.
- We analyse cash flow, serviceability, goals, and perceived risks to strengthen the application.
- We assess the skills and experience the client brings to the business.
- We educate clients on key pitfalls, warning signs, and essential action points.
- We act as the trusted finance partner, working solely in the client's best interest.



25+ Years  
Experience



Trusted  
40+ Lenders



Industry  
Expert



Service  
Focused

### The Winquote Approach

At Winquote, we combine finance expertise with professionalism, teamwork, and integrity - and the persistence to see every deal through. Our highly trained team and commitment to continuous learning give partners a single, reliable point of contact, ensuring each deal is managed with precision and care.

#### **Our Highly Trained Team & Commitment to Learning**

Winquote's strength lies in our people - experienced brokers supported by skilled analysts, broker assistants, and a dedicated client support team. We invest in ongoing CPD and in-house training to keep our expertise sharp and our work ethics strong. With a single point of contact for every deal, we deliver consistent, informed, and professional service from start to finish.



#### **Core Values**

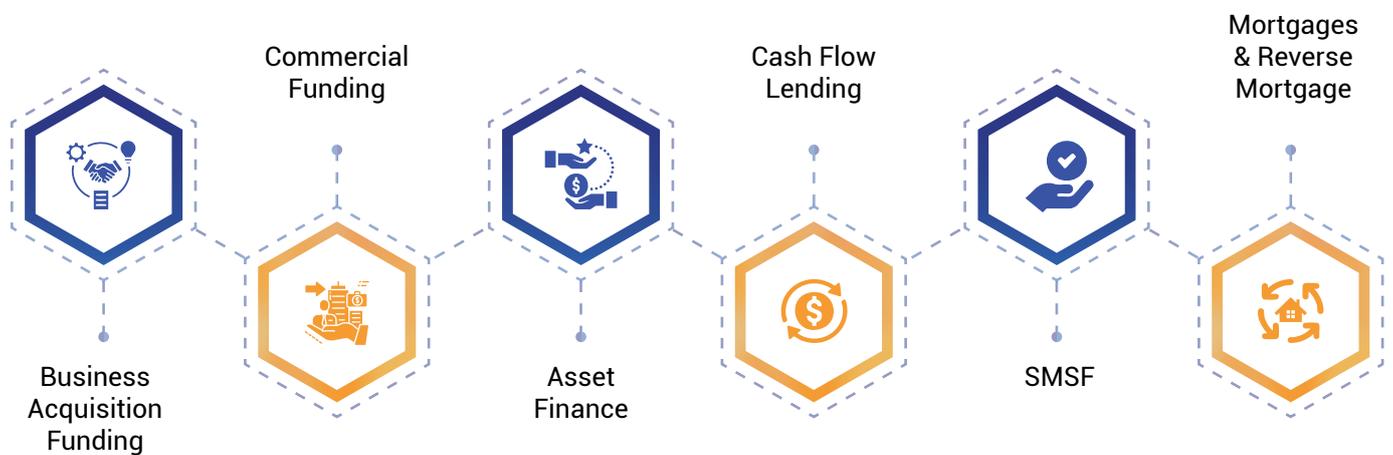
- Strong work ethic and professionalism
- Teamwork with clear, open communication
- Tenacity – we don't give up
- Customer-focused service
- Loyalty and integrity
- Project management



## Our Services



Winquote provides tailored finance solutions across a range of needs, from business acquisitions and commercial funding to asset finance, cash flow lending, SMSFs, and mortgages. Our expertise ensures partners, and their clients access the right solution, at the right time, with confidence and clarity.



*Our values drive every deal – ensuring professionalism, persistence, and client-first results.*

## Our Accreditations & Certifications

Winquote's memberships and lender accreditations reflect our commitment to professionalism, compliance, and market access, giving partners and clients confidence in every finance solution.

### Accredited by:

- Major Lenders
- Second Tier Lenders
- FinTechs

### Member of:



*A trusted ambassador, guiding your clients through complex finance with clarity and care.*

## Why Partner with Winquote SME Finance?

We specialise in preparing SME buyers for success - fast, professional, and bank-ready - so your deals progress smoothly and close sooner.

### Partnering with Winquote means:

- **Efficient Approvals** – We streamline the finance process, so clients are ready to move quickly.
- **Stronger Applications** – We package deals in the way banks want to see them, increasing approval chances.
- **Informed Buyers** – Clients understand cash flow, serviceability, and business risks before they commit.
- **Reduced Deal Risk** – We address finance obstacles early to keep deals alive.
- **Trusted Advice** – We act solely in the buyer's best interests, giving them confidence in the purchase.

With over two decades in business finance and deep industry insight, Winquote is the finance partner that helps you protect your pipeline and close more deals.

### Winquote SME Finance

[SEE MORE REVIEWS](#)

Wayne Singh 5.0 ★★★★★

I cannot speak highly enough of the service I've received from Joel Reddy at Winquote Finance.

From the outset, Joel demonstrated exceptional customer service, professionalism, and diligence in understanding my financial situation.

Despite the challenges I faced, he was able to carefully assess my needs and match me with the right loan, ensuring I had the best possible outcome...

Phong le 5.0 ★★★★★

What can I say – WinQuote, and especially Shayal, were incredible. Business lending is complex, drawn out, and there are many stakeholders. It's a challenging process. Shayal made it easy. She guided us through every step, explained things in plain English, and offered sharp advice on managing the process and people involved. We always knew what was coming next. It was an outstanding experience. Don't waste time shopping around – WinQuote is the broker you want. Thank you Shayal!

Wayne Kobrin 5.0 ★★★★★

I can't recommend Vijay and his team highly enough!

When my buyer's finance application was unexpectedly rejected, I thought the deal was over. I introduced my buyer to Vijay who went above and beyond, working tirelessly, exploring every possible lender.

Thanks to their efforts, the purchase went ahead. A true professional who genuinely cares about their clients' outcomes!

### Contact Details

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### Our Competitive Advantage



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Experience



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40+ Lenders



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