

Application Coversheet



Introducer Details

Introducer Name

Introducer Company Name

Telephone No. ()

Aggregator

Email Address

Estimated Settlement Date

Product Selection (tick all that apply)

Professional

Standard

Construction

Equity Support

NDIS

Deal Summary

Documentation Checklist

Please submit all applications and supporting documents via LoanApp

All Applications

- Introducer's submission notes
- Serviceability Calculator Report PDF
- KYC / VOI Form
- Certified Identification documents from list of approved certifier on page 6 of the KYC / VOI Form
- Last statement for each credit card
- Any account closure letters from past 3 months
- Last 3 months statement on any other debts

PAYG Members – Income Verification

- 3 most recent consecutive payslips (latest less than 14 days old from day of submission)
- Latest 5 consecutive bank statements from a financial institution in the name of the employee showing regular salary credits from the employer
- Last 2 years PAYG Summary, or
- Last 2 years personal tax returns and corresponding NoA

Self Employed Members – Income Verification

- Last two years full business/company/trust taxation returns and financials
- Last two years full personal taxation returns & tax assessment notices.
- Business Activity Statements (BAS) for the most recent period and
- Corresponding 6 months business bank statements

New Purchase Applications

- Rental appraisal letter from a registered real estate agent.
- Evidence of Funds to Complete
- Signed Contract of Sale

Construction Applications

- Documents from New Purchase Applications, plus
- Signed or accepted builder contract

NDIS Applications

- Documents from New Purchase and Construction Applications, plus
- Rental appraisal from SDA provider/manager

Professional Product Applications

- University Degree
- IT Industry Specific Certificate

Refinance Applications

- Current paid rates notice for all properties being refinanced
- Six months loan statements for loan being refinanced (Internet transaction listings must be supported by an original statement from the financial institution to show ownership)
- Rental statement for the most recent period and corresponding bank statement showing bank account credits.
- Signed Discharge Authority for outgoing bank/financial institution