

Summary	Date	
Sullillary	Date.	

## **Broker Loan Summary Sheet**

Broker Company Name Aggregator (or Direct ACL) State:    Mobile:   Email:
State: Mobile: Email:  Loan Amount (\$)  LVR (%)  Security Address  EMV/Purchase Price  Estimated Completion Date  Conditional Approval Purchase Refinance Refinance SMSF - Residential SMSF - Residential NDIS - Construction NDIS - Established Standard Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantor 5 Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Loan Details and Type  Loan Amount (S)  LVR (%)  Security Address  EMV/Purchase Price  Estimated Completion Date  Conditional Approval Purchase Refinance SMSF - Residential SMSF - Residential SMSF - Commercial SMSF - Commercial SMSF - Commercial SMSF - Standard Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantor 5 Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Lona Amount (\$)  LVR (%)  Security Address  EMV/Purchase Price  Estimated Completion Date  Conditional Approval Purchase Refinance Refinance Investment Commercial SMSF - Residential SMSF - Commercial SMSF - Commercial SMSF - Residential Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Lona Amount (\$)  LVR (%)  Security Address  EMV/Purchase Price  Estimated Completion Date  Conditional Approval Purchase Refinance Refinance Investment Commercial SMSF - Residential SMSF - Commercial SMSF - Commercial SMSF - Residential Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Security Address  EMV/Purchase Price  Estimated Completion Date  Conditional Approval Purchase Refinance Investment Commercial SMSF - Residential SMSF - Commercial SMSF - Commercial SMSF - Commercial SMSF - Commercial SMSF - Standard Standard Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Security Address  EMV/Purchase Price  Estimated Completion Date  Conditional Approval Purchase Refinance Investment Commercial SMSF - Residential SMSF - Commercial SMSF - Commercial SMSF - Commercial SMSF - Commercial SMSF - Standard Standard Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Estimated Completion Date  Conditional Approval Purchase Refinance Refinance SMSF - Residential SMSF - Commercial SMSF NDIS - Construction NDIS - Established Professional - Lender Paid LMI  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Estimated Completion Date  Conditional Approval Purchase Refinance Owner Occupied Investment SMSF - Commercial SMSF - Commercial SMSF - Construction NDIS - Established Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Conditional Approval Purchase Refinance Seasy Refinance Investment Commercial SMSF - Residential SMSF - Commercial SMSF NDIS - Construction NDIS - Established Standard Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Purchase Refinance Easy Refinance Owner Occupied Investment Commercial SMSF - Residential SMSF - Commercial SMSF NDIS - Construction NDIS - Established Standard Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 Or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Owner Occupied Investment Commercial  SMSF - Residential SMSF - Commercial SMSF  NDIS - Construction NDIS - Established Standard  Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1  or SMSF Corporate Trustee  Borrower 2  Guarantors  Guarantor 1  Guarantor 2  SMSF Trust  Bare Trust  Corporate Bare Trustee
SMSF - Residential SMSF - Commercial SMSF  NDIS - Construction NDIS - Established Standard  Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1
NDIS – Construction NDIS – Established Standard Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 Or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Professional - Lender Paid LMI Essential Worker - Lender Paid LMI NDIS/Co-Living  Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
Borrower 1 or SMSF Corporate Trustee Borrower 2 Guarantors Guarantor 1 Guarantor 2 SMSF Trust Bare Trust Corporate Bare Trustee
or SMSF Corporate Trustee  Borrower 2  Guarantors  Guarantor 1  Guarantor 2  SMSF Trust  Bare Trust  Corporate Bare Trustee
or SMSF Corporate Trustee  Borrower 2  Guarantors  Guarantor 1  Guarantor 2  SMSF Trust  Bare Trust  Corporate Bare Trustee
Borrower 2  Guarantors  Guarantor 1  Guarantor 2  SMSF Trust  Bare Trust  Corporate Bare Trustee
Guarantors  Guarantor 1  Guarantor 2  SMSF Trust  Bare Trust  Corporate Bare Trustee
Guarantor 2  SMSF Trust  Bare Trust  Corporate Bare Trustee
SMSF Trust  Bare Trust  Corporate Bare Trustee
Bare Trust  Corporate Bare Trustee
Corporate Bare Trustee
Rate P&I or IO IO Term Loan Term Split Amount Loan Purpose Fixed Term
Rate P&T or IO TO Term Loan Term Split Amount Loan Purpose Fixed Term
Written summary of application (eg, source of income, applicant background, etc)
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Written summary of application (eg, source of income, applicant background, etc)
Written summary of application (eg, source of income, applicant background, etc)
Written summary of application (eg, source of income, applicant background, etc)  Exceptions (Policy or Pricing) or "outside the box thinking" being requested (if required)
Rate P&I or IO IO Term Loan Term Split Amount Loan Purpose Fixed Te