

## Broker Loan Summary Sheet

<b>Broker Name</b>			
Broker Company Name			
Aggregator (or Direct ACL)			
State:	<input type="text"/>	Mobile:	<input type="text"/>
		Email:	<input type="text"/>

### Loan Details and Type

Loan Amount (\$)	<input type="text"/>
LVR (%)	<input type="text"/>
Security Address	<input type="text"/>
EMV/Purchase Price	<input type="text"/>
Estimated Completion Date	<input type="text"/>

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Conditional Approval           | <input type="checkbox"/> Formal Approval                    |   |
| <input type="checkbox"/> Purchase                       | <input type="checkbox"/> Refinance                          | <input type="checkbox"/> Easy Refinance |
| <input type="checkbox"/> Owner Occupied                 | <input type="checkbox"/> Investment                         | <input type="checkbox"/> Commercial     |
| <input type="checkbox"/> SMSF - Residential             | <input type="checkbox"/> SMSF – Commercial                  | <input type="checkbox"/> SMSF           |
| <input type="checkbox"/> NDIS – Construction            | <input type="checkbox"/> NDIS – Established                 | <input type="checkbox"/> Standard       |
| <input type="checkbox"/> Professional - Lender Paid LMI | <input type="checkbox"/> Essential Worker - Lender Paid LMI | <input type="checkbox"/> NDIS/Co-Living |

Borrower 1	<input type="text"/>
or SMSF Corporate Trustee	<input type="text"/>
Borrower 2	<input type="text"/>
<b>Guarantors</b>	
Guarantor 1	<input type="text"/>
Guarantor 2	<input type="text"/>
SMSF Trust	<input type="text"/>
Bare Trust	<input type="text"/>
Corporate Bare Trustee	<input type="text"/>

Rate	P&I or IO	IO Term	Loan Term	Split Amount	Loan Purpose	Fixed Term
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Written summary of application (eg, source of income, applicant background, etc)

### Exceptions (Policy or Pricing) or “outside the box thinking” being requested (if required)