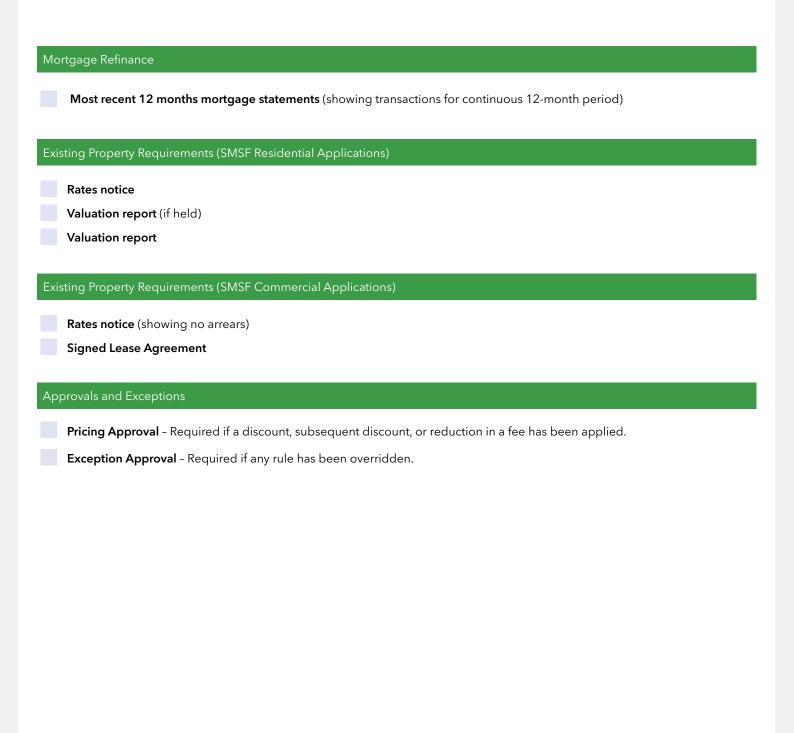
Easy Refi Checklist - SMSF



Application Details Easy Refi Calculator Easy Refi Application Form Customer Needs Analysis (Regulated Loans) OR **Broker Declaration Applicant Details** Signed Exit Strategy - Required for applicants 55 years old or older. Provide one of the following combinations: **Digital VOI** OR Provide at least 100 points of certified identification using the following identification items: Australian Birth Certificate **Australian Drivers Licence Australian Passport Medicare Card Overseas Drivers Licence International Passport Manual VOI Form SMSF** Requirements **SMSF Trust Deed** (Required for Settlement) Most recent year's SMSF Audit Report Bare Trust Deed (Required for Settlement) ATO Search (Performed by Origin MMS) SMSF Trustee Company and Bare Trustee Company ASIC Search or Certificate of Registration - (Performed by Origin MMS)

Easy Refi Checklist - SMSF





Note: The online checklist dynamically adjusts based on the information provided, ensuring only relevant items appear. It can be updated anytime to reflect policy and requirement changes.