

Broker Loan Summary Form



Summary Date

Broker Name

Broker Company Name

Aggregator (or Direct ACL)

State

Mobile

Email

Loan Details and Type

Loan Amount (\$)

LVR (%)

Security Address

EMV/Purchase Price

Estimated Completion Date

☐

Conditional Approval

☐

Formal Approval

☐

Purchase

☐

Refinance

☐

Easy Refinance

☐

Owner Occupied

☐

Investment

☐

Commercial

☐

SMSF - Residential

☐

SMSF - Commercial

☐

SMSF

☐

Professional - Lender Paid LMI

☐

Essential Worker - Lender Paid LMI

☐

Standard

Borrowers

Borrower 1

or SMSF Corporate Trustee

Borrower 2

Guarantors

Guarantor 1

Guarantor 2

SMSF Trust

Bare Trust

Corporate Bare Trustee

Broker Loan Summary Form



Rate	P&I or IO	IO Term	Loan Term	Split Amount	Loan Purpose	Fixed Term

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

Exceptions (Policy or Pricing) or "outside the box thinking" being requested (if required)