

Application Coversheet



Introducer Details

Introducer Name

Introducer Company Name

Telephone No. ()

Email Address

Estimated Settlement Date

Aggregator

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