



CHECKLIST

Please Supply all documents as PDF's

Client

PRESENT LOANS/FACILITIES

- Mortgage Statements** (Most recent 6 months history):
 - Printout to today from Internet OK, which shows account number only
 - But Need 1 page extra (can be old) though which was **mailed by bank** showing: **Name, Address and account number**
- Copy of 3 months statement for any **loans we are consolidating/refinancing**.
- Copy of most recent statement for any **credit cards you hold**

IDENTIFICATION

- Copy of **Two forms of I.D.** for each person applying. 'We'll require JP'd copies within the next 7 working days'.
- 1) Drivers License
- 2) Medicare Card
- 3) Passport 'If you have one'

INCOME if You work for an employer

- 2 pay slips (to be No older than 1 month & computer generated).
- Last years Group Certificates/Statement of Earnings from **employer**
- ATO tax office NOTICE OF ASSESSMENT- Most Recent

IF YOU WORK FOR YOURSELF.

- Last 2 years P&L/Balance Sheet- for Business/Partnership
Last 2 years Full tax returns for Business/Partnership
Last 2 years Full tax returns for yourself/ves
- Rent you receive via 'Most Recent' Monthly/Statement from Managing Agent on existing 'investment' properties:

- Copy of the Latest Rates Notice on any existing property/s owned
- Super Statement showing balance
- Proof of Savings – Last 3 months full bank statements
- Rent you pay – A letter from your Real Estate Agent on their letterhead listing:
 - Addressed to/Confirming all parties listed on the lease
 - Date you commenced occupation of the property
 - Confirming the weekly amount of rent you pay
 - Confirming the conduct of your rent repayments