

Mortgage Document Checklist

Do you need to bring any of the following?

- Signed & Completed Application form
- 100 Point Identification Check
 - Passport – 70 Points
 - Driver's Licence – 40 Points
 - Credit Card – 25 Points
 - Medicare Card – 25 Points
 - Council Rate Notice – 25 Points
- Council Rates Notice (All Properties)
- Rental Statements (All Investment Properties)
- Credit Card Statements (Latest Statements) – All Credit Cards
- Personal Loan Statements – All Loans
- Superannuation Statements

FINANCIAL INFORMATION – EACH BORROWER AND/OR GUARANTOR

Employees

- Last years tax records (Group Certificate or Tax Return)
- 2 recent payslips or Letter confirming employment (detail income, position and length of service)

Self-Employed

- Last 2 years Tax Returns including Balance Sheet and Profit & Loss Statement.
- Last 2 years Income Tax Assessment Notices

PROPERTY DETAILS

- For **PROPERTY PURCHASE**: evidence of savings (last 3 months statements) and contract of sale (front page)
- For loan **REFINANCE**: loan statements from existing lender (last 6 months loan statements)
- For **INVESTMENT PURCHASE**: include rental statements or rental opinion from Agent.