



## Finance Application Checklist

The following documentation is required to enable us to accurately assess your lending requirements and approach the most suitable lender for your situation:

### Income Verification

#### PAYG

- Last 2 consecutive payslips
- Current Payment Summary or full Tax Return
- Additional payslips demonstrating regular overtime payments (if applicable)

#### Self-Employed

- Last 2 years full Tax Returns (personally)
- Last 2 years full Tax Returns and financials on the trading company/trust
- Most recent Notice of Assessment

#### Family Payments/Pension

- Centrelink "Statement of Benefit"

### Identification

Clear scanned colour copies of:

- Driver's Licence or Passport
- Medicare Card



### Assets and Liabilities

- Last 3 months bank statements on savings, investment and business accounts
- Last month's credit card statements
- Statements on all existing loans
- Most recent Rates Notice
- Last 3 months statements evidencing ownership of shares or managed funds
- Term Deposit Certificate (if applicable)
- Copy of current Lease or statement/letter from real estate agent evidencing rental income received on investment property

### Purchases

- Signed and dated Contract of Sale
- Evidence of sufficient funds to complete purchase