



## Finance Application Checklist SMSF Purchase

To apply for a self managed superannuation fund home loan we require the following documentation:

### 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



### New SMSF

- Last 2 years Superannuation Statements
- Certified copy of the SMSF Trust Deed
- Corporate custodial entity name and ACN
- Certified Custodial Trust Deed
- Contract on the property being purchased
- Rental assessment from sales agent on property being purchased

### Existing SMSF

- Last 2 years financial statements and Tax Returns on SMSF
- Certified copy of the SMSF Trust Deed
- Corporate custodial entity name and ACN
- Certified Custodial Trust Deed (once prepared)
- Contract on the property being purchased
- Rental assessment from sales agent on property being purchased