

BORROWER CHECKLIST

PURCHASE & REFINANCE



100 Point ID

Passport including VISA

Drivers License

Other

PURCHASE

Supporting Documents:

- 6 months savings statement
- Term deposit / shares / any bank savings statement
- Latest month personal transaction statement
- Latest month loan transaction statement for all personal loans
- Copy of executed Contract of Sale incl. deposit receipt

PAYG

- PAYG - permanent full / part time
- 2 latest pay slips

CASUAL & CONTRACTING

- 2 latest pay slips
- Last year Group Certificate
- Last month Family Assistance Payment (Centre Link)

SELF EMPLOYED

- Last 2 years tax returns (business & personal)
- Business Profit & Loss
- Business Balance Sheet
- Tenancy Agreement / Rental Statement for all investments
- Real Estate Agent letter confirming estimated rental income
- Last 1 year personal & business tax returns
- Last 1 year Notice of Assessment issued by ATO

REFINANCE

Supporting Documents:

- Term deposit / shares / any bank savings statement
- Latest month personal transaction statement
- Last 6 months home loan statements for all properties being refinanced

PAYG

- PAYG - permanent full / part time
- 2 latest pay slips

CASUAL & CONTRACTING

- 2 latest pay slips
- Last year Group Certificate
- Last month Family Assistance Payment (Centre Link)

SELF EMPLOYED

- Last 2 years tax returns (business & personal)
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