

## Mortgage Planning Session Checklist

Your Name: \_\_\_\_\_ Contact Telephone: (\_\_\_\_) \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

The items marked below are necessary to process your loan. Your cooperation in providing this information will assist in a prompt response to your finance application.

### DETAILS OF INCOME:

#### (If You Are An Employee)

- ☐ Last 2 Pay Slips from Employer.
- ☐ Letter from Employer Clearly Stating:
  - ☐ 1. Your Commencement Date.
  - ☐ 2. Full Time - Part Time - Casual Position.
  - ☐ 3. Gross Income.
  - ☐ 4. Year To Date Gross Earnings.
- ☐ Last 2 years Tax Returns.
- ☐ Last 2 Years PAYG Summaries and Tax Assessment Notices.
- ☐ Proof of Pension / Centrelink Income.

#### (If You Are Self Employed)

- ☐ Last 2 Years Profit and Loss Statements for the Business.
- ☐ Last 2 Years Balance Sheets for the Business.
- ☐ Last 2 Years Personal and Business Tax Returns.
- ☐ Trust Deed.
- ☐ Memorandum and Article of Association.

#### (Other Income Status)

- ☐ Evidence of Existing Rental Income.
- ☐ Rental Appraisal from Real Estate Agent.

### SAVINGS

- ☐ Last 6 Months Bank Statements.
- ☐ Share Certificates.
- ☐ Recent Personal Superannuation Statements.

### DETAILS of any LOANS / CREDIT CARDS

- ☐ Personal Loans
  - ☐ 1. Copy of Loan Contract.
  - ☐ 2. Last 6 Months Statements.
- ☐ Credit Cards - Last 3 Months Statements.
- ☐ Overdrafts - Last 3 Months Statements.

### RENTAL REFERENCE

- ☐ A Rental Reference Letter from the Managing Agent or Landlord for the last 6 months.

### IDENTIFICATION

- ☐ Drivers Licence.
- ☐ Medicare Card.
- ☐ Passport.
- ☐ Copy of Birth Certificate.
- ☐ Copy of Marriage Certificate.
- ☐ ATM Cards.

### SECURITY

- ☐ Copy of Purchase Contract.
- ☐ Copy of Deposit Receipt.
- ☐ Copy of Contract of Sale of Existing Property. (If Applicable)
- ☐ Copy of Rates Notice.
- ☐ Copy of Home and Contents Insurance Policy.

### BUILDING / CONSTRUCTION

- ☐ Copy of Council Approved Plans.
- ☐ Copy of Fixed Price Building Contract.
- ☐ Copy of Specification.
- ☐ Copy of Builders All Risk Insurance.

### GIFT

- ☐ Statutory Declaration stating Non-Repayable Gift.

### OTHER (Please Give Details)

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

be prepared ...

and let us help you put the pieces together.